<Mercy Clinic's Volunteer Management System>

User Manual

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Table of Contents

User Manual 1

Introduction 1

Overview 2

Conventions 2

Cautions & Warnings 2

Getting Started 4

Set-up Considerations 4

User Access Considerations 4

Accessing the System 4

System Organization & Navigation 4

Exiting the System 6

Using the System 7

Calendar Volunteer Features 8

Navigating the Calendar 8

View Slot 8

Sign up for Slot 9

Filter Slots 11

Accessing the System 13

Login 13

Forgot Password 14

Calendar Administrator Features 17

Create Slot 17

View Slot 18

Schedule Slot 19

Unschedule Slot 20

Delete Slot 21

Filter Slots 22

Calendar Administrator System 24

View Administrator List 24

Create Administrator 25

Edit Administrator Profile 26

Delete Administrator Profile 28
Volunteer System 29
Volunteer Listing 29
Volunteer Search 30
Volunteer View Hours 31
Generate Report For One Volunteer 33
Generate Report For All Volunteers 35
Create Volunteer 38
Edit Volunteer 40
Delete Volunteer 41
Volunteer Add Hours 43
Volunteer Edit Hours 45
Volunteer Delete Hours 48
Check In / Check Out System 50
Check In 51
Check Out 52
Others 54

1. Introduction

This User Manual (UM) provides the information necessary for Mercy Clinic's staff and volunteers to effectively use the Volunteer Management System (VMS) designed by Team MC2 at Texas Christian University.

2. Overview

The Mercy Clinic Volunteer System is designed for use by the non-profit clinic Mercy Clinic in Fort Worth, TX. Currently, this non-profit clinic manages a collection of over 100 medical, dental, and support specialized volunteers who perform various duties for the clinic during its hours of operation. Scheduling these volunteers for slots times during days of operation is currently performed through the use of email and whiteboards on site.

The administration of Mercy Clinic would like a technological solution that would allow volunteers to schedule their shifts through the use of a web application. The administrative team would also list listings of their volunteers, ability for volunteers to check in and check out for their shifts, and ability to generate excel reports containing volunteer hours through the web application.

Through a graphical interface on a web-based application, the administrators for this system have access to all these desired features and more.

2.1 Conventions

This document provides screen prints and corresponding narrative to describe how to use the Mercy Clinic Volunteer System.

When an action is required on the part of the reader, it is indicated by a line beginning with the word “Action:” For example:

Action: Click on OK.

Fields or buttons to be acted upon are indicated in bold italics in the Action statement; links to be acted upon are indicated as links in underlined blue text in the Action statement.

Note: The term ‘user’ is used throughout this document to refer to a person who requires and/or has acquired access to the Mercy Clinic Volunteer System.

2.2 Cautions & Warnings

Please recognize that a ‘user’ in this manual refers to a specific type of user more commonly labeled as an ‘administrator’. If you are a type of user commonly known as a ‘volunteer’, you have extremely limited access to the system and your usage abilities are discussed and demonstrated in section 4.1.

To use the system as an administrator, an account must be made for you by another administrator. Please do not abuse the privileges of an administrator, such as scheduling volunteers without their consent, wrongfully manipulating hour data, creating administrators without the authorization of the clinic - these actions will result in the deletion of your administrator account and punitive actions as seen fit by the Mercy Clinic Administrative Board.

To use the system as a volunteer, a volunteer record must be created for you by an administrator. Please do not abuse the privileges of a volunteer, such as scheduling yourself for shifts you have no intention of fulfilling or scheduling another volunteer for a shift without their

consent. These actions will result in the change or deletion of the volunteer account and possible permanent loss of volunteer privileges within the system.

3. Getting Started

3.1 Set-up Considerations

VMS screens are designed to be viewed at a minimum screen resolution of 800 x 600. To optimize your access to the Mercy Clinic Volunteer System:

1. Please disable pop-up blockers prior to attempting access to the Mercy Clinic Volunteer System.
2. Please allow the use of cookies prior to attempting access to the Mercy Clinic Volunteer System.
3. Google Chrome is the recommended browser for best usage.
4. For Check In / Out, please use Incognito Window mode web browser.
5. Please ensure that you have stable access to the Internet.

3.2 User Access Considerations

Two different types of users have access to the system, with drastically different amounts of accessibility.

A Volunteer user is defined as a user with access to the volunteer calendar. This user group has no account for the system and can only utilize the volunteer calendar. This user can view open slots on the calendar and schedule themselves in the system. There are no restrictions for viewing the volunteer calendar - it is open to the public. However, a volunteer user must be listed in the volunteer database in order to schedule a slot.

An Administrator user is defined as a user with total access to the Mercy Clinic Volunteer System. After providing a valid login username and password for the system, the admin is provided with complete access to all the features of the system.

3.3 Accessing the System

A volunteer user can access the system in two ways:

- Visit mercy-clinic.org and select ‘Volunteer Calendar’ from the navigation header.
- Directly type ‘mercy-clinic.herokuapp.com’ into the address bar of your current browser

3.4 System Organization & Navigation

The Volunteer User has one page, the calendar, with these features available:

Calendar Volunteer View

View Slot

Sign up for Slot

Filter Slots

The administrator has two pages, the login page accessed through the calendar volunteer page and the dashboard page after logging in.

Login page features:

- Login
- Forgot Password

Dashboard page features:

- Calendar Admin View
  - Create Slot
  - View Slot
  - Schedule Slot
  - Unschedule Slot
  - Delete Slot
  - Filter Slots
- Volunteers
  - List Volunteers
  - Search Volunteer
  - View Volunteer
    - Generate Report for One Volunteer
  - Create Volunteer
  - Edit Volunteer
  - Delete Volunter
  - Generate Report for All Volunteers
  - Generate Report for All Volunteers of 1 department
- Check In/Out
  - Check In
  - Check Out
  - Drop In Check In
- Administrators
  - List Administrators
  - Create Admin
  - Edit Admin

Delete Admin

3.5 Exiting the System

To properly exit the system as a volunteer user, simply exit the page through renavigation or closing the browser. To exit the system as an administrator, click the ‘Logout’ button on the top navigation bar to return to the volunteer calendar. Then exit the system the same as a volunteer calendar.

4. Using the System

The following subsections provide detailed, step-by-step instructions on how to use the various functions or features of the Mercy Clinic Volunteer System.

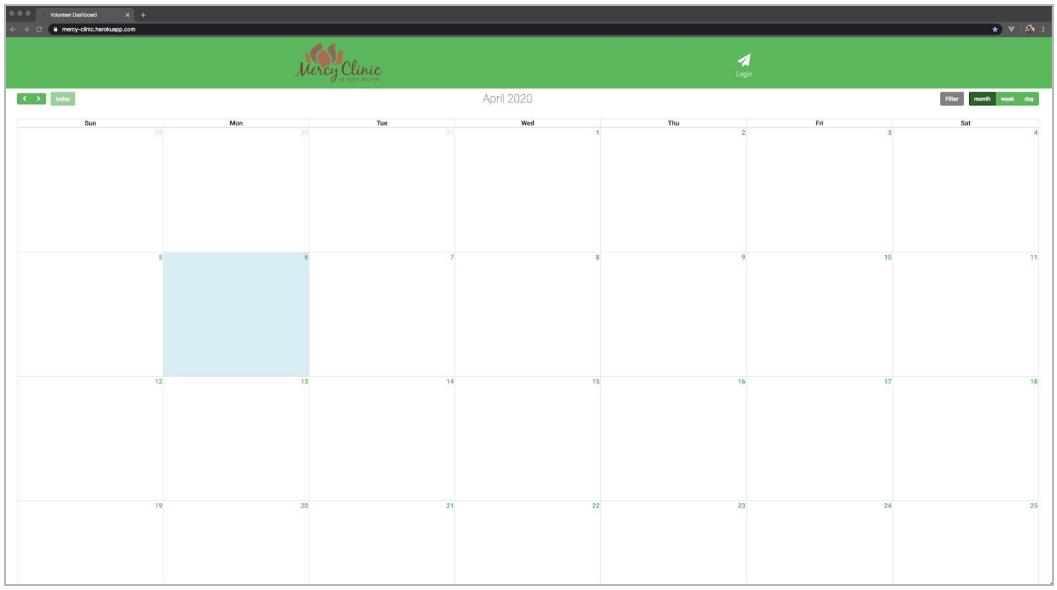
4.1 Calendar Volunteer Features

4.1.1 Navigating the Calendar

The volunteer view of the calendar is accessed by navigating to the website homepage at https://mercy-clinic.herokuapp.com. This calendar allows volunteers to view and sign up for available slots.

The Volunteer View of the Calendar is presented to the Volunteer as the very first page of the scheduler. The view will have the current month displayed showing 4 rows and a column for every day of the week. The current day of the month will be highlighted in a light blue. There are two clickable images at the top of the page, the Mercy Clinic logo and an image of a paper plane to Login as an Administrator. Below that on the left there are navigation tabs to go to the previous or future month.

Then on the right side on the same row as the navigation tabs there are three filters that will change the view of the calendar. There is a monthly, weekly, and daily view of the calendar.

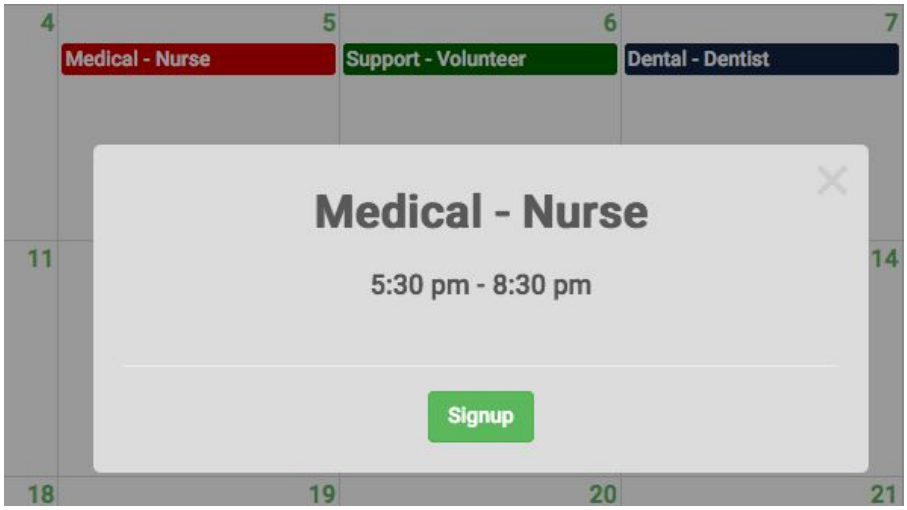


4.1.2 View Slot

This feature allows volunteers to view and interact with slots on the calendar. The calendar only shows volunteers upcoming unscheduled slots.

Slots on the calendar are color coded. Red slots are medical, blue slots are dental, and green slots are support.

Action: Click on a slot to view more information about the slot.

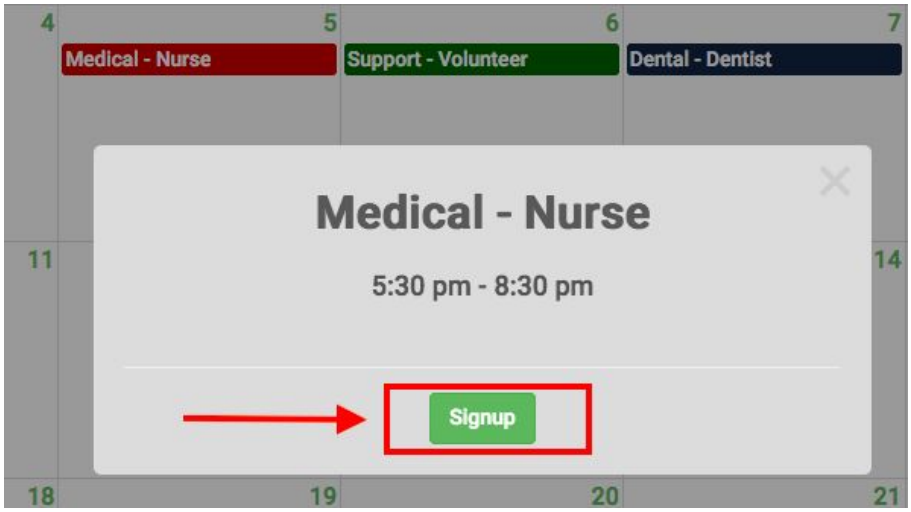


For each slot, volunteers can view its time window and sign up for it.

4.1.3 Sign up for Slot

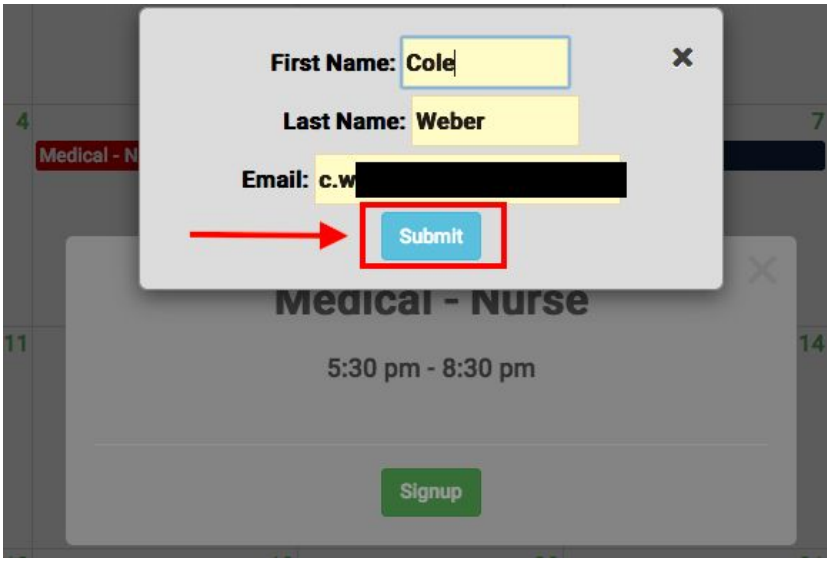
This feature allows volunteers to signup a volunteer for a slot.

Action: After clicking on a slot, click on the ‘Signup’ button to bring up the schedule slot form.

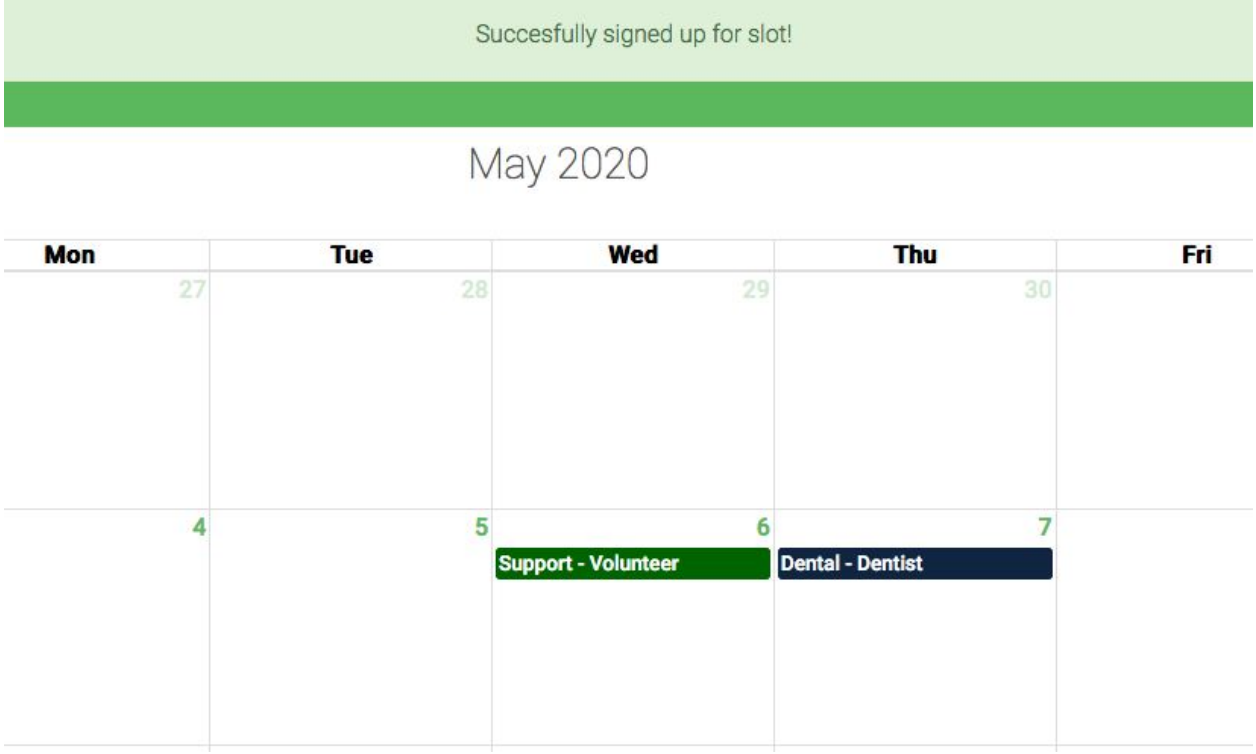


Action: Fill in the first name, last name, and email, then click submit to sign up for this slot. The first name, last name and email must match exactly how they appear in the Volunteers table. For example, if in the Volunteers table the first name contains parentheses or a dash, those characters must be included.

Note: if the information is entered incorrectly, or the volunteer is not in the database, you will receive an error message.



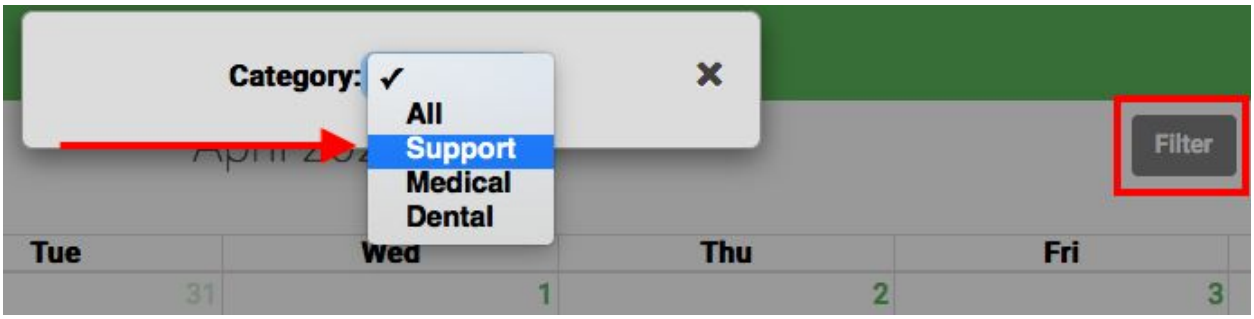
If the slot is successfully scheduled, you will receive the following message and it will no longer be available for sign up for.

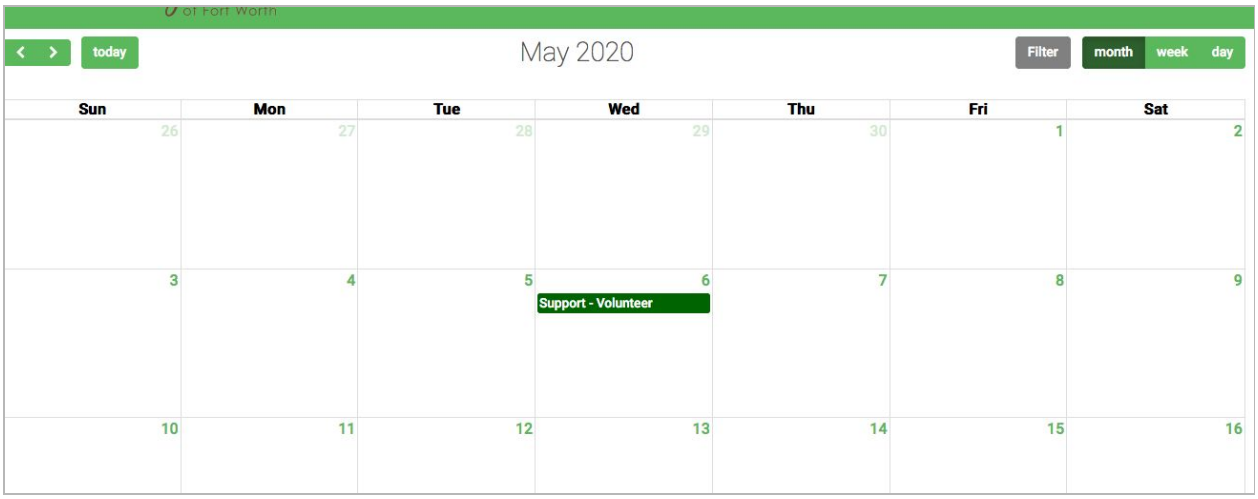


4.1.4 Filter Slots

This feature allows an administrator to filter displayed slots by Support, Medical, or Dental categories.

Action: Click the ‘Filter’ button to bring up the filter drop down and select the desired category to filter by.


Category:
All
Support
Medical
Dental
Filter
Tue
Wed
Thu
Fri
31
1
2
3

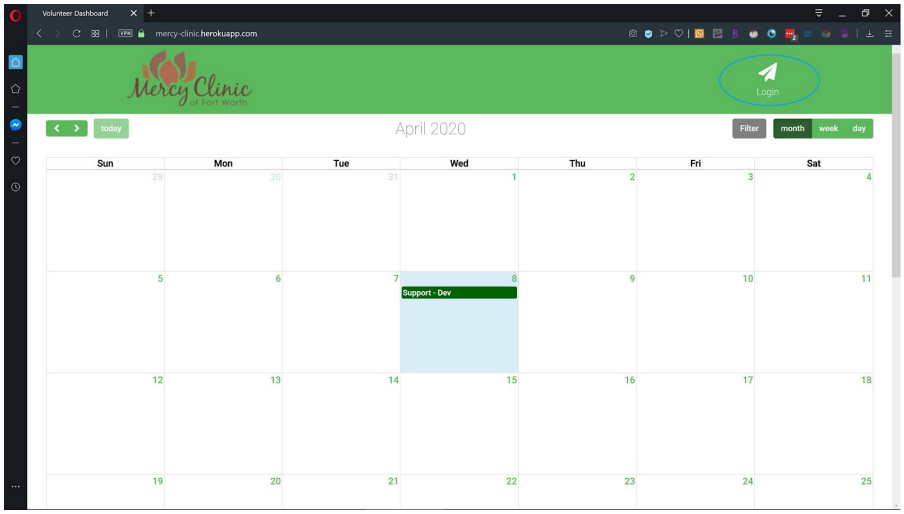

today
May 2020
Filter
month
week
day
Sun
Mon
Tue
Wed
Thu
Fri
Sat
Support - Volunteer

4.2. Accessing the System

This feature allows people with valid account information to be given administrator access to the Mercy Clinic Volunteer System.

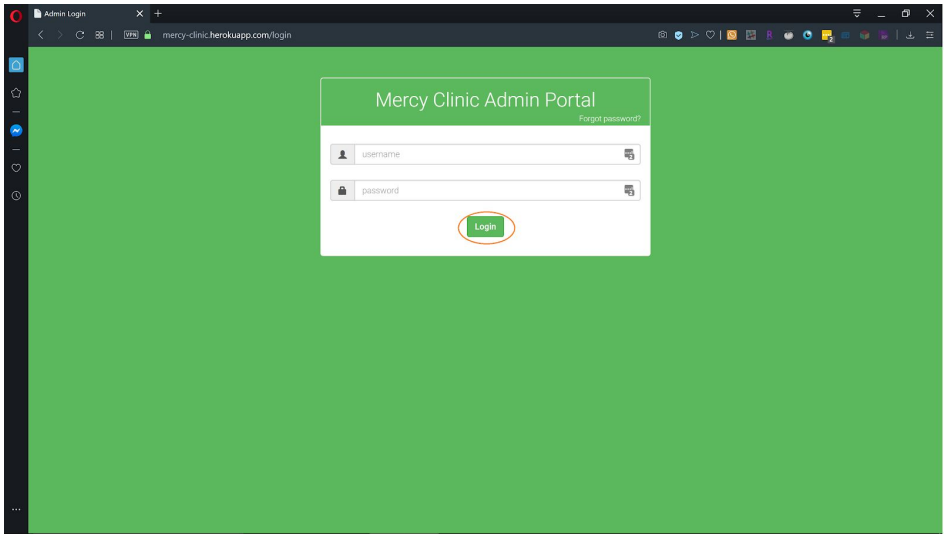
4.2.1. Login

To gain access to the Mercy Clinic Volunteer System as an administrator, please navigate to the Calendar Volunteer View (section 4.1).



Action: Click the white ‘Login’ button in the top right hand corner. It is identified by the blue circle in the image above.

This will take you to a page where you can fill in your administrator credentials:



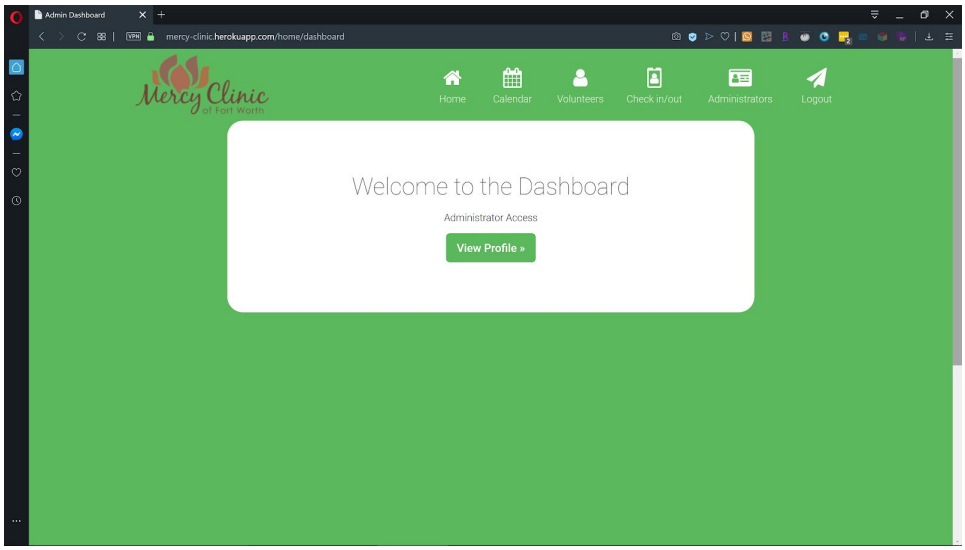
Action: Fill in your valid username and password. Then click ‘Login’, identified by the orange circle in the image above.

If you entered in a username that was not recognized by the system, or a incorrect password, the system will provide a error message on the screen like this:

Incorrect Username or Password

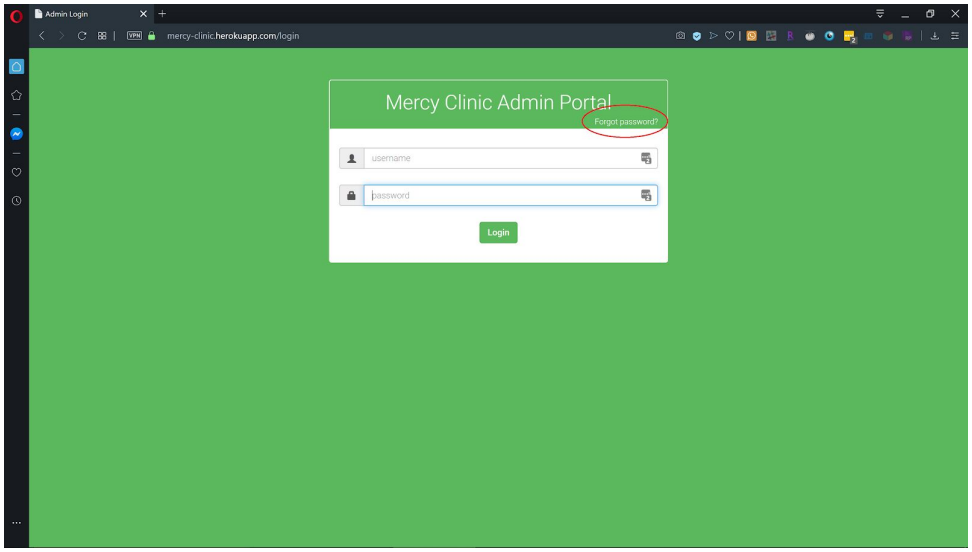
If that is the case, just try to fill in the fields again with valid username and password credentials. Check for misspelled entries or other user related errors.

If you clicked 'Login' and your credentials were successfully validated, you will be redirected to the dashboard page:



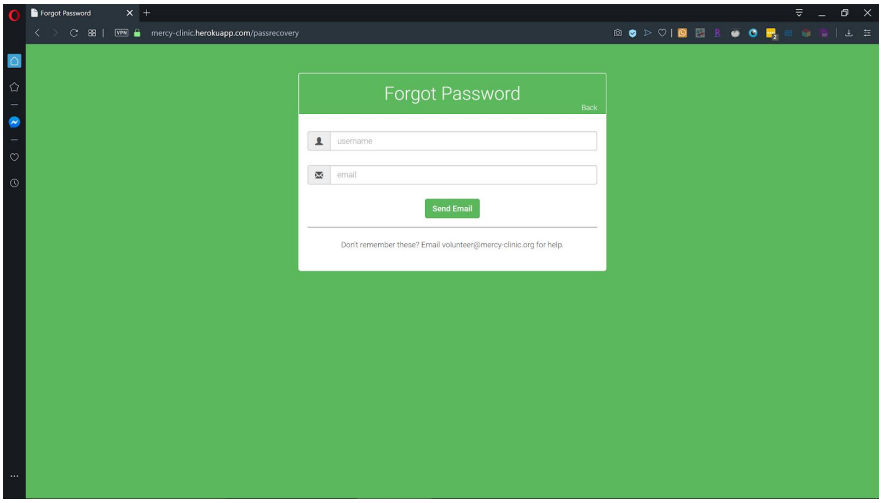
4.2.2. Forgot Password

This feature is used in case a user with administrator credentials cannot recall their password. To begin, navigate to the login page:



Action: Click on ‘Forgot Password?’ text in white, circled in red within the image above.

You will be redirected to this page:



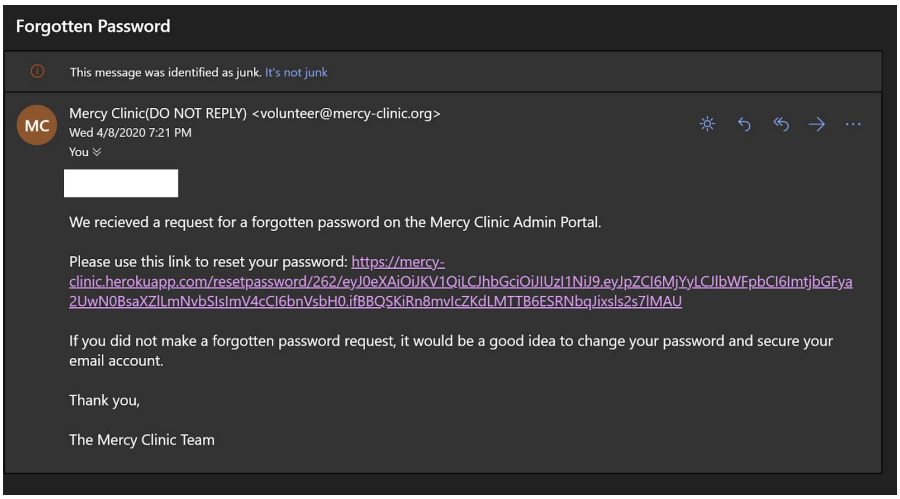
Action: Fill in the fields with your valid username and the email *associated with your account.* Then click ‘Send Email’.

Once you have completed that step, you will see this success message pop up on the page:

Email has successfully been sent!

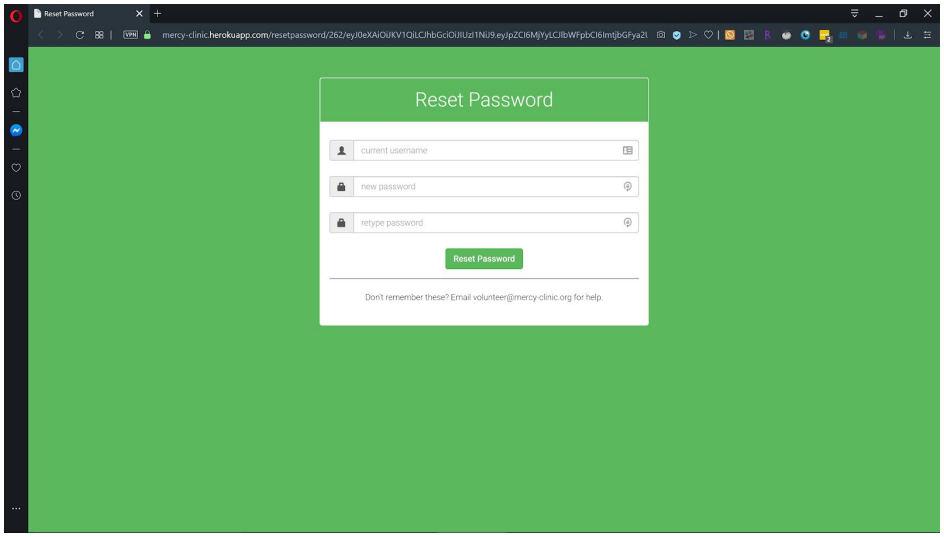
If you cannot retrieve your username and the email associated with your admin account, you will need to email volunteer@mercy-clinic.org for help.

You should recieve an email that looks like the image below. Please make sure to double check your junk folder.



Action: Travel to the link given within the email. Either click on the link in the email, or copy and paste in your preferred web browser.

Please keep in mind that the reset password link expires after 1 day. If your link has expired, simply start over and send a new email with a new link.



Action: Fill in your current username and your new password in (twice for verification purposes). Then click ‘Reset Password’.

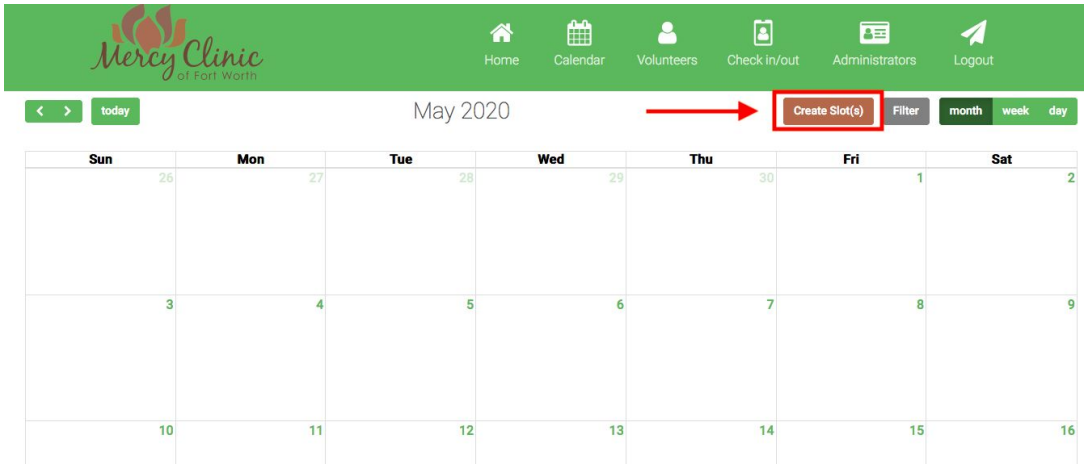
You will receive a message declaring the reset to be successful. You can then try to login (see section 4.2.1) with your new password.

4.3. Calendar Administrator Features

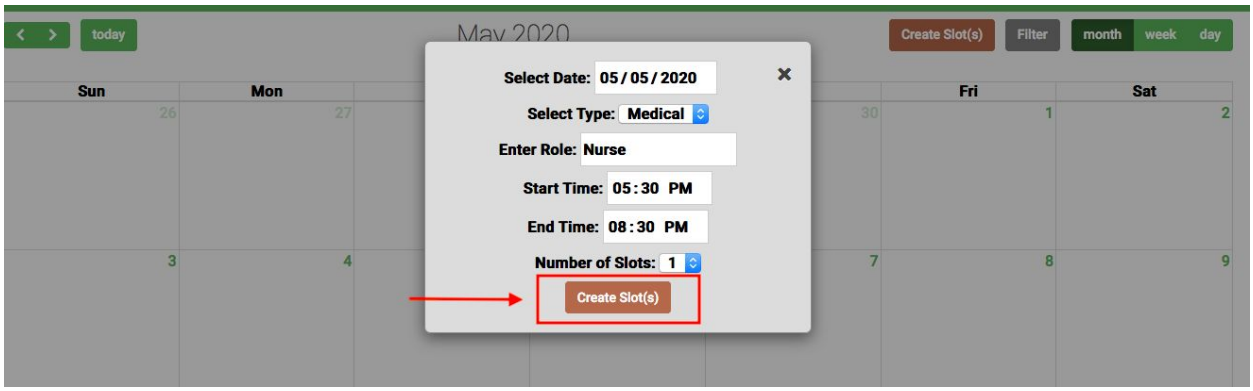
The administrator view of the calendar is accessed from the dashboard by clicking on the calendar button in the top navigation bar. This calendar allows administrators to create slots, view slots, schedule slots, unschedule slots, and delete slots.

4.3.1. Create Slot

This feature allows administrators to create new slots on the calendar, that volunteers can sign up for.

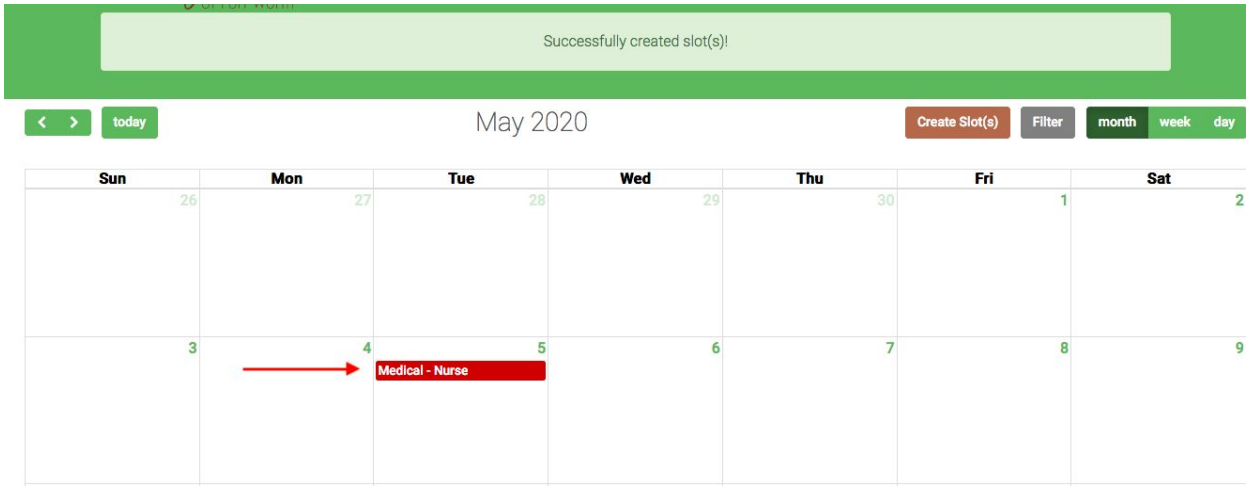


Action: Click on the 'Create Slot(s)' button to bring up the create slot form.



Action: Fill in all fields to desired needs and when finished click on 'Create Slot(s)'. If you would like to create duplicate slots at this time, change the *Number of Slots* field to desired number of duplicates.

Once submitted, you will see this success message appear and your slot(s) will be displayed and the calendar.

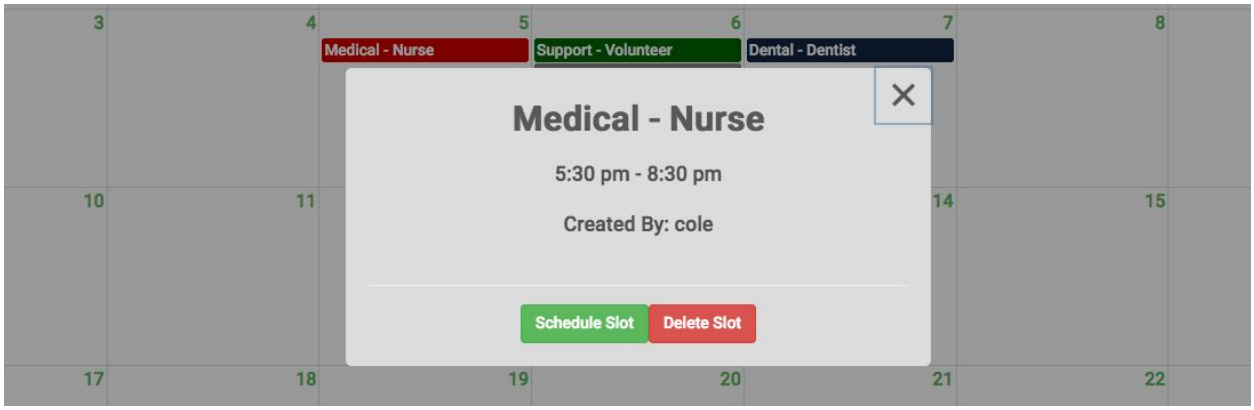


4.3.2. View Slot

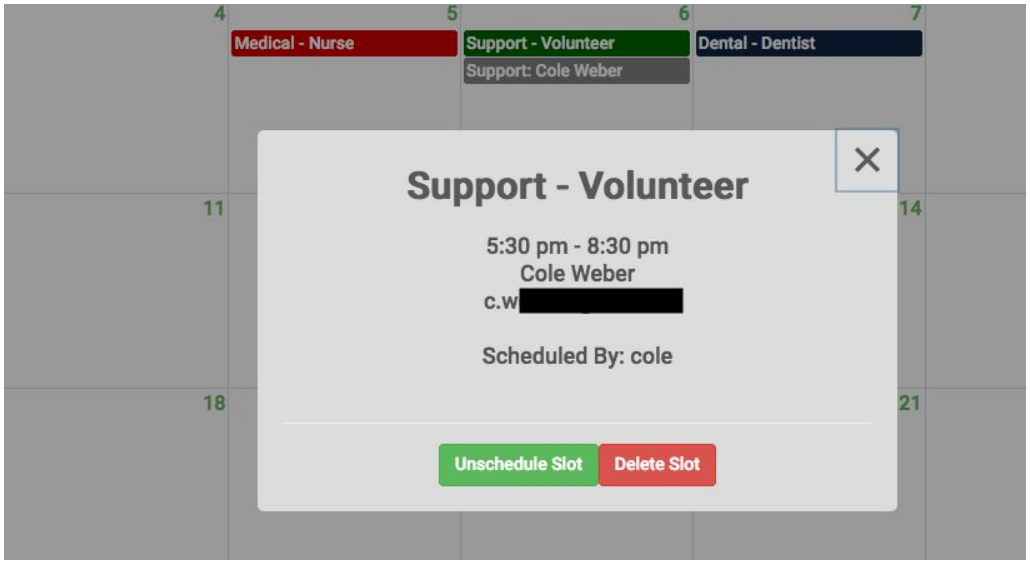
This feature allows administrators to view and interact with slots on the calendar

Slots on the calendar are color coded. Red slots are medical, blue slots are dental, and green slots are support. All scheduled slots are grey.

Action: Click on a slot to view more information about the slot.



For unscheduled slots, you can view its time window, schedule it, or delete it. The username of the administrator who created it Is also displayed.

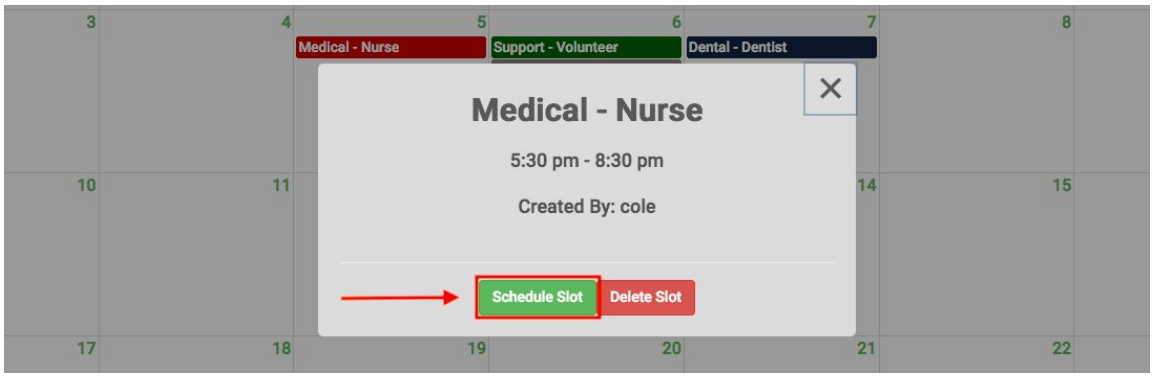


For scheduled slots, you can view its time window, the name and email of the volunteer who signed up for it, and if it was scheduled by a volunteer or an administrator. You can also unschedule it or delete it.

4.3.3. Schedule Slot

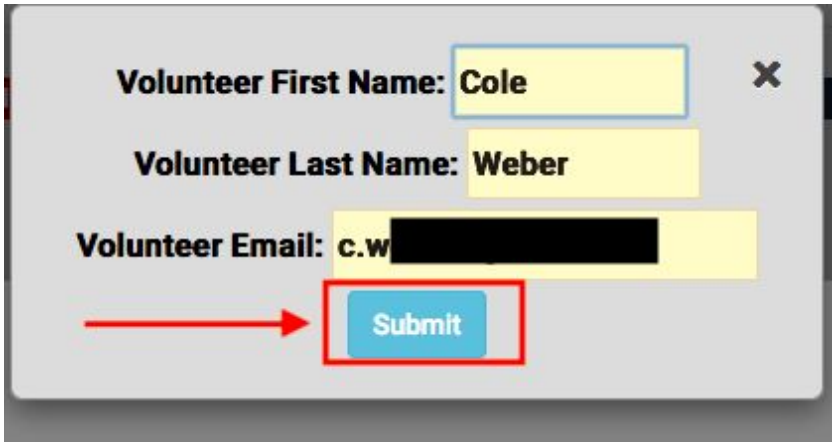
This feature allows administrators to sign up a volunteer for a slot.

Action: After clicking on an unscheduled slot, click on the 'Schedule Slot' button to bring up the schedule slot form.

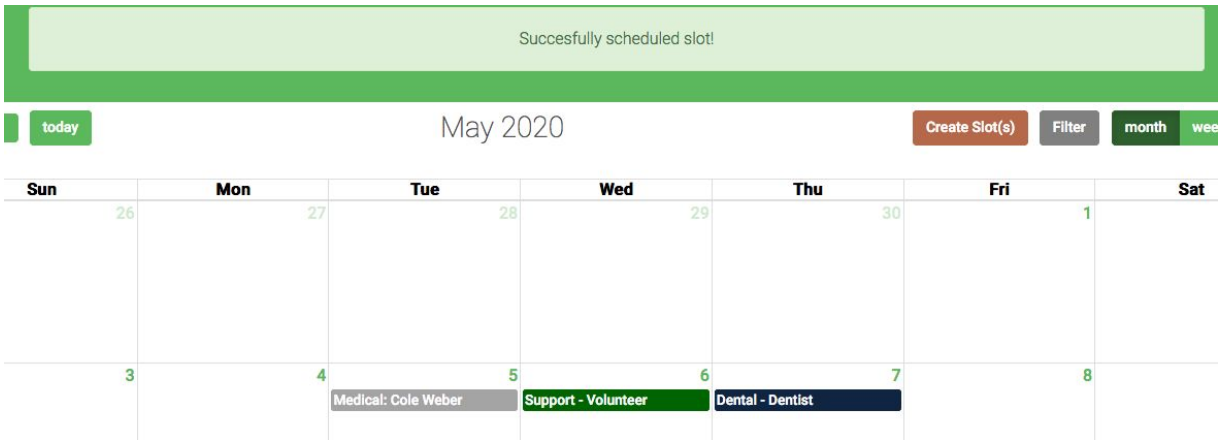


Action: Fill in the first name, last name, and email for the volunteer, then click submit to sign them up for this slot. The first name, last name and email **must match exactly** how they appear in the Volunteers table. For example, if in the Volunteers table the first name contains parentheses or a dash, those characters must be included.

Note: if the information is entered incorrectly, or the volunteer is not in the database, you will receive an error message.



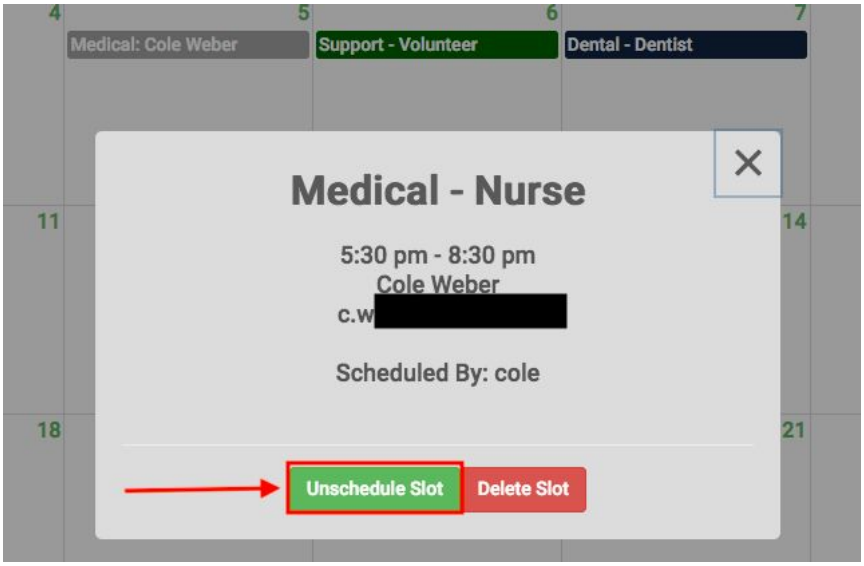
If the slot is successfully scheduled, you will receive the following message, the slot will turn grey, and it will no longer be available for sign up by a volunteer.



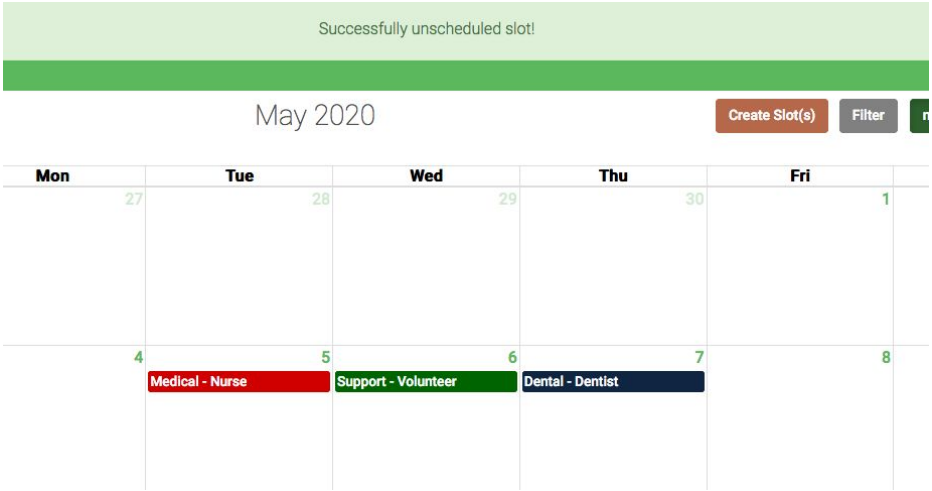
4.3.4. Unschedule Slot

This feature allows an administrator to unschedule a previously scheduled slot.

Action: After clicking on a scheduled slot, click on the ‘Unchedule Slot’ button.



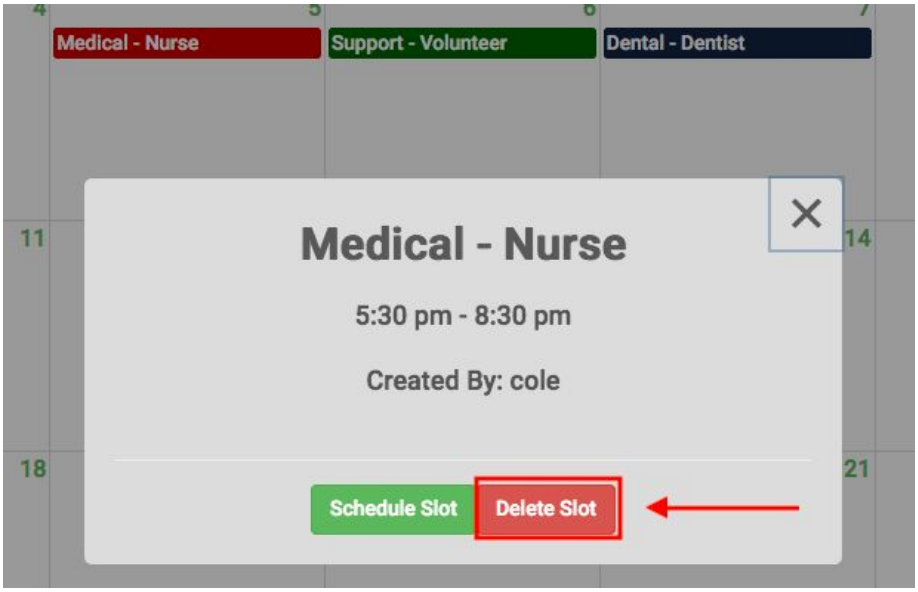
After clicking the unschedule button, you will receive the following message and the slot will become available again for sign up.



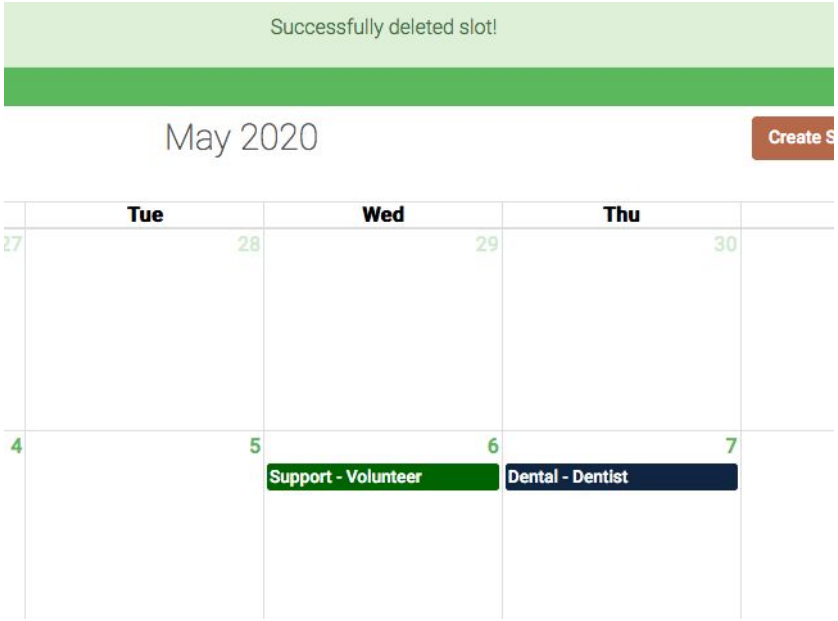
4.3.5. Delete Slot

This feature allows an administrator to delete a scheduled or unscheduled slot.

Action: After clicking on a scheduled or unscheduled slot, click on the ‘Delete Slot’ button.



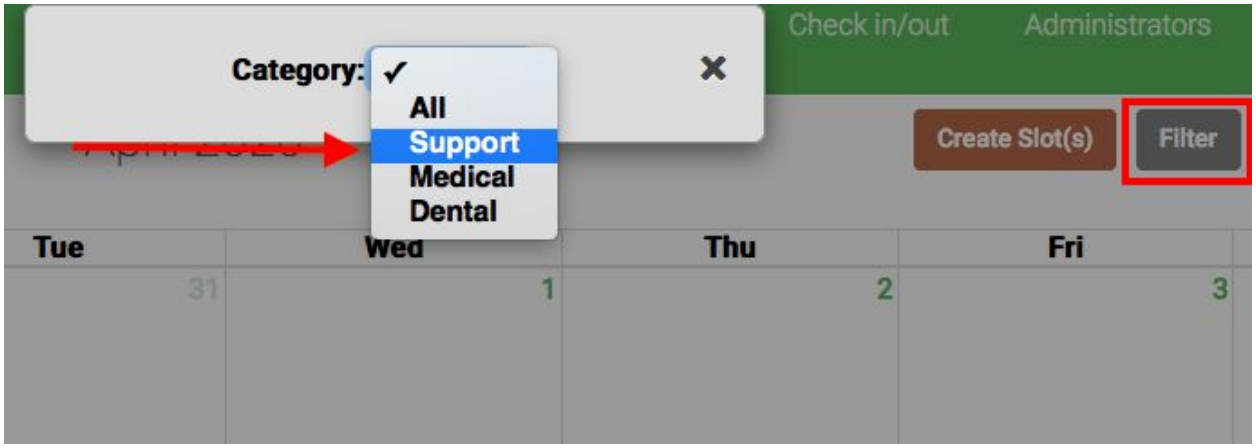
After clicking the delete button, you will receive the following message and the slot will be removed from the administrator and volunteer calendars.



4.3.6. Filter Slots

This feature allows an administrator to filter displayed slots by Support, Medical, or Dental categories.

Action: Click the ‘Filter’ button to bring up the filter drop down and select the desired category to filter by.

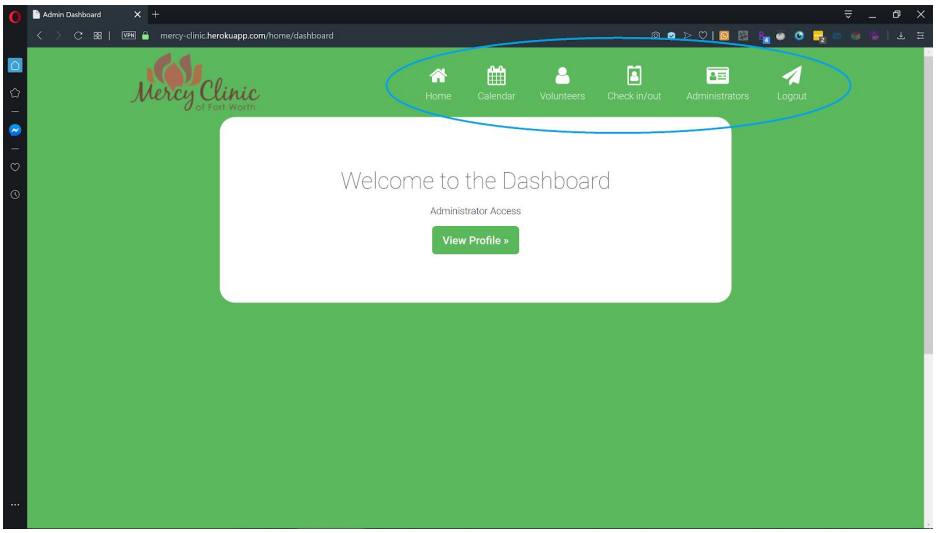

Category:
All
Support
Medical
Dental
Check in/out
Administrators
Create Slot(s)
Filter
Tue
Wed
Thu
Fri
31
1
2
3

4.4. Calendar Administrator System

The Administrator System allows the administrators to keep a current listing of the accounts that have administrator access to the Mercy Clinic Volunteer System. Within this system, regular administrators can view a listing of all the administrators, edit their own admin profile, and create a new administrator. The super administrator can do all these things and also edit any administrator profile and delete any administrator profile (with the exception of themselves). Please be advised that all of these features are dependent on the user having administrator privileges, with some features requiring super administrator privileges.

4.4.1. View Administrator List

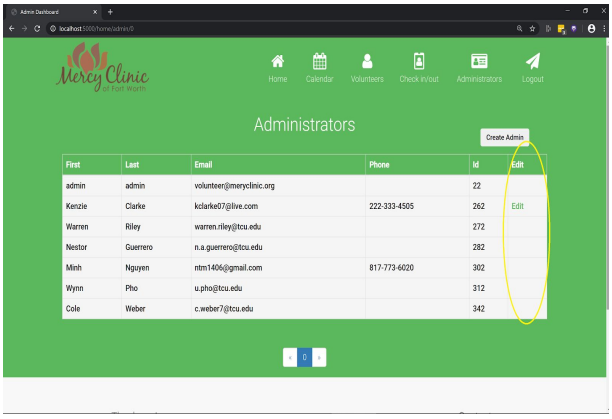
For the purpose of this manual, we are starting at the Dashboard page of the system, having been logged in as an administrator or super administrator. Note that this feature can be accessed from any page where the administrator header is visible, identified by the blue circle in the image below.



Action: Click the button labeled “Administrators” within the navigation bar, as outlined by the blue circle. The button is also identified with a white a green id-card icon.

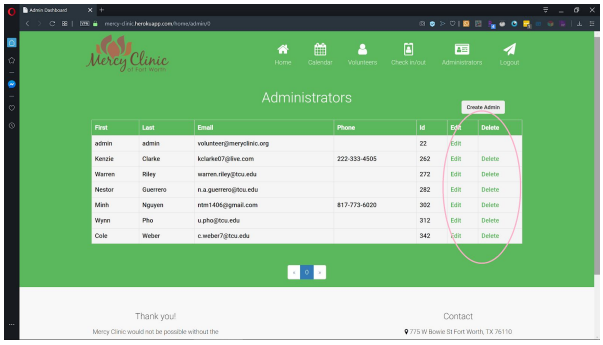
You will arrive at the Administrators page, which provides both an administrator and a super administrator with a listing of all the administrator accounts on the Mercy Clinic Volunteer System.

Administrator View



Notice that the regular administrator *does not* have permission to edit any other administrator but themselves. (This is circled in yellow). Also note the lack of any deletion buttons to prevent an administrator from deleting an administrator account.

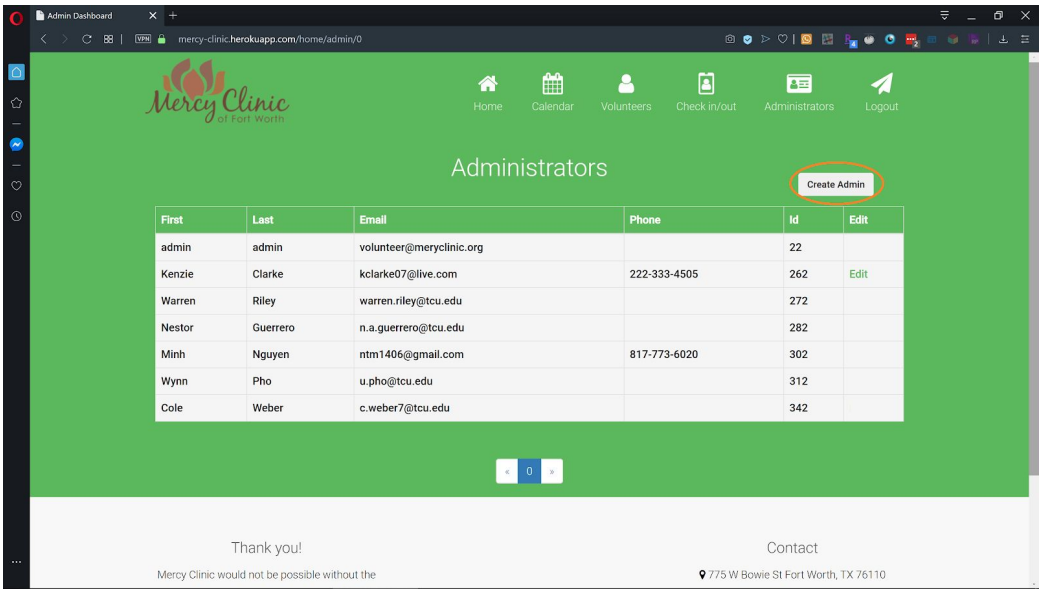
Super Administrator View



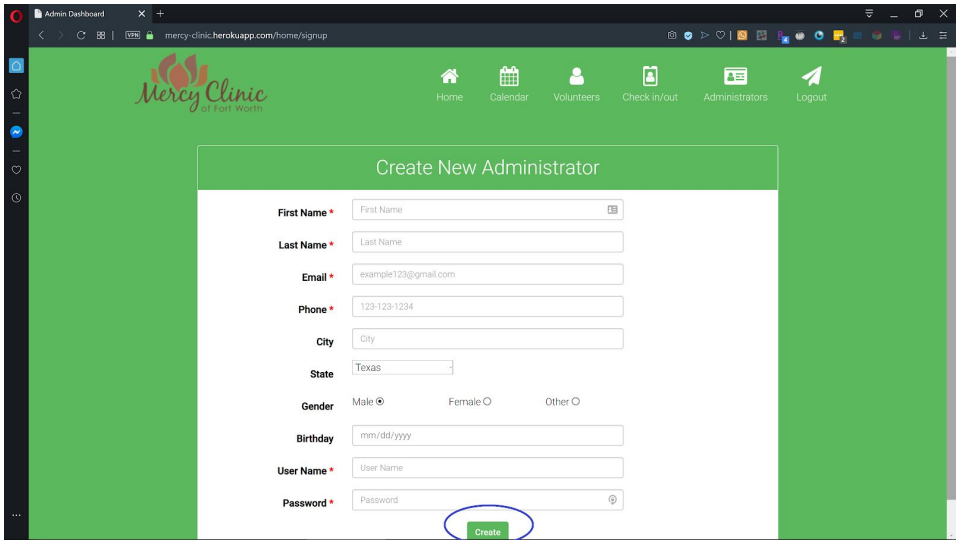
The super administrator has the ability to edit *every* profile. In addition, this user can delete all the profiles except it's own. These are both circled in pink.

4.4.2. Create Administrator

To create an administrator, please navigate to the Administrators page (see section 4.4.1). Both an administrator and the super administrator have the ability to access this feature.



Action: Click the 'Create Admin' button circled in orange within the image above.

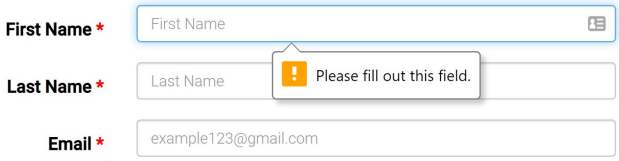


Action: Fill in the fields.

Note that required fields are marked by a red asterisk. These fields must contain something for the administrator to be created. If they are empty, the system will identify the empty fields for the user when the user attempts to submit the form.

Action: Click the 'Create' button. (circled in blue at the bottom of the image)

If you hit submit without filling in all required fields, you will receive a notice that looks like this:

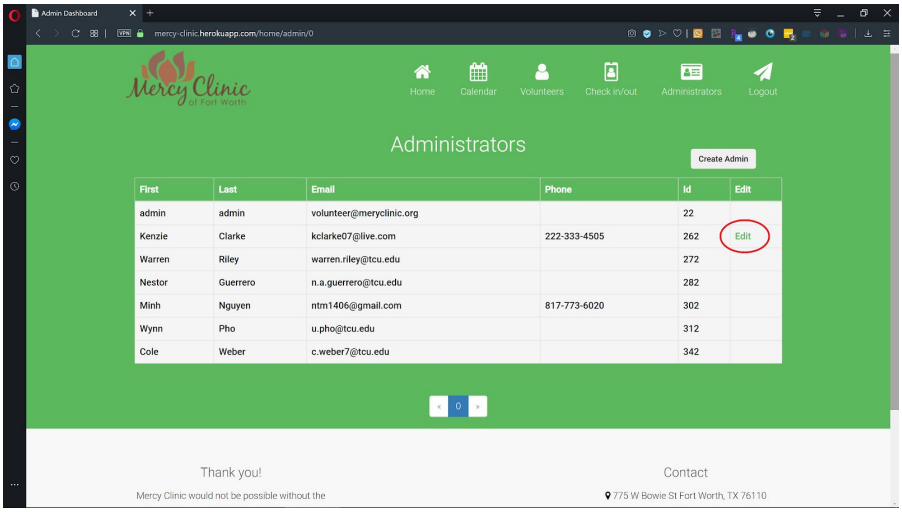


If this is the case, please go back, follow the instructions, and fill out all the empty fields marked with a red asterisk.

Once you have clicked create with a successfully filled out profile, the system should return you to the Administrators page, where your new admin profile will be listed at the bottom of the list.

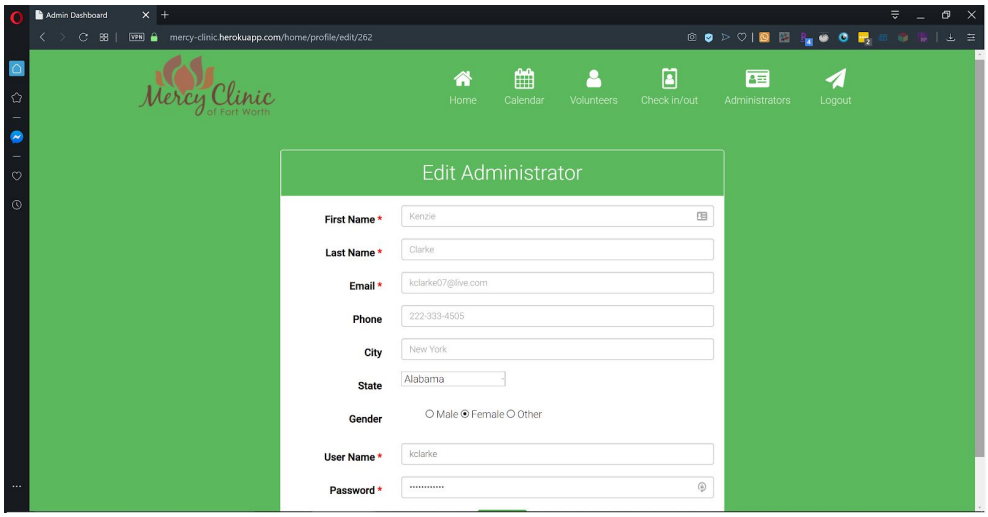
4.4.3. Edit Administrator Profile

To edit an administrator profile, please navigate to the Administrator page (see section 4.4.1). Please note that to edit an administrator profile that is not your own, you must be the super administrator.



Action: Click the 'Edit' button listed in the table for the admin profile you wish to edit (circled in red on the image)

The system will direct you to a page with a form that has the current values of the profile filled in the fields.



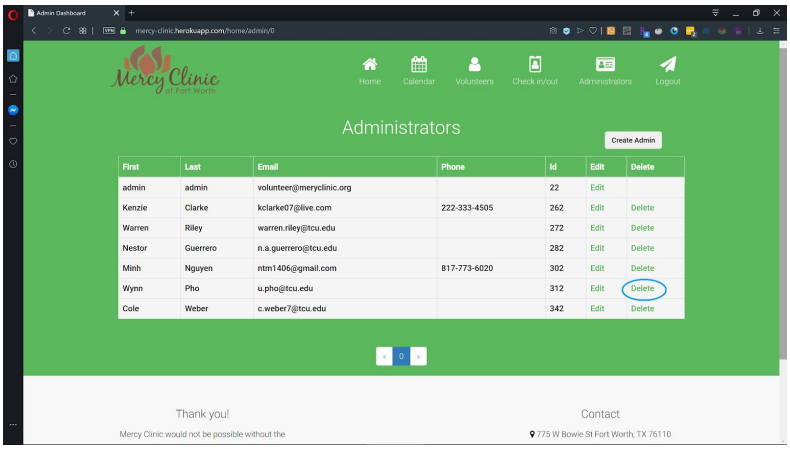
Action: Modify any fields that you would like to change. Keep in mind that all fields with the red asterisk must contain non empty fields of the appropriate format (see section 4.3.2 for listing of appropriate format).

Action: Click 'Submit' at the bottom of the form.

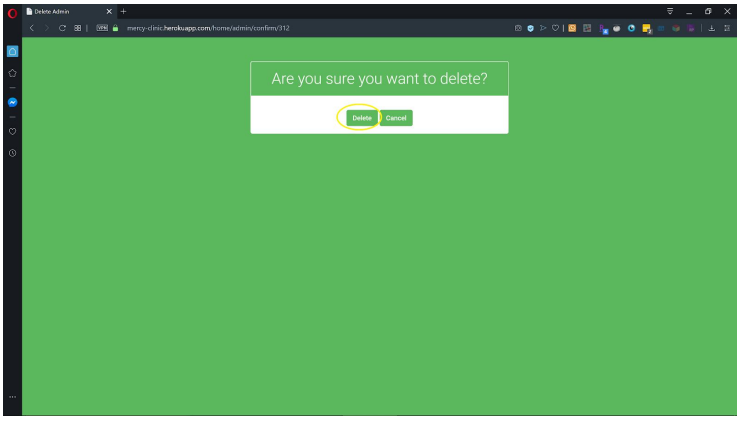
The system will redirect you to the Administrators page, where a green box will display the message `Profile details successfully updated.`

4.4.4. Delete Administrator Profile

To delete an administrator profile, you must be logged in as the super administrator. As the super administrator, your page will look like the image below.



Action: Click the ‘Delete’ button in the row that contains the profile information of the admin profile you wish to delete.



Action: Click the ‘Delete’ button to confirm your intent to delete the profile.

If you *do not* wish to delete the account, click ‘Cancel’ and you will be returned to the Administrator page. Once you have clicked this ‘delete’ button, the account will be permanently deleted from the system database, with no option of recovery unless the entire database is restored from a backup!

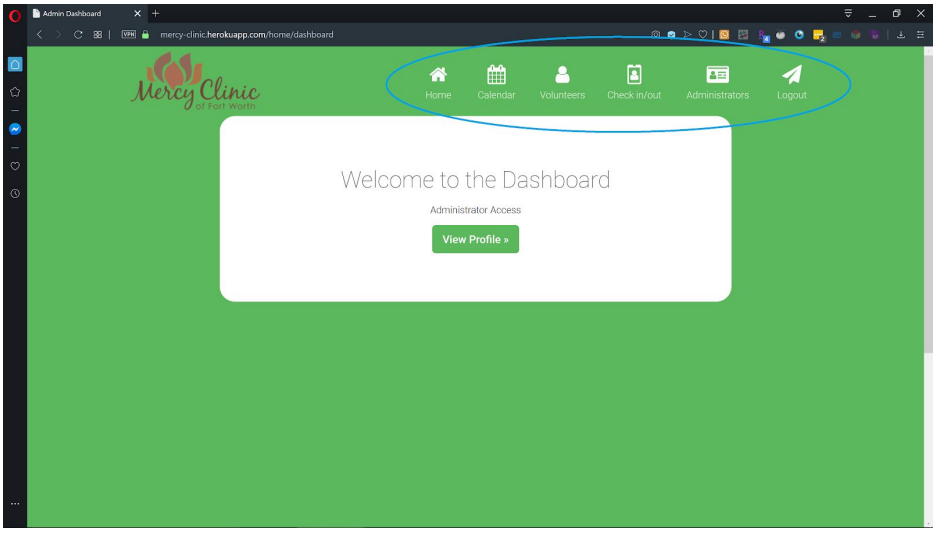
Once you have clicked ‘Delete’, you will be returned to the Administrator page, with the deleted profile gone from the database and no longer listed on the list of administrators

4.5. Volunteer System

The Volunteer System allows the administrators to keep a current listing of the verified individuals that volunteer at Mercy Clinic. Admins can view a listing of these volunteers, search for a specific volunteer, view a volunteer's recorded hours spent at the clinic, and update information pertaining towards volunteers in the database. Please be advised that all of these features are dependent on the user having administrator privileges.

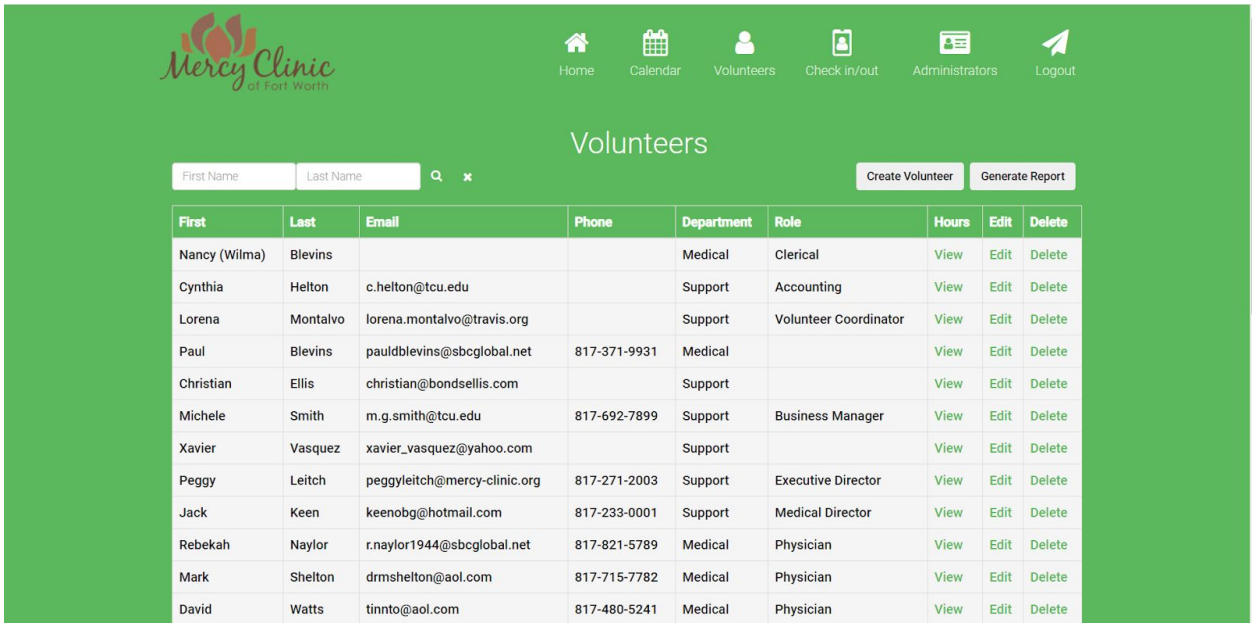
4.5.1. Volunteer Listing

For the purpose of this manual, we are starting at the Dashboard page of the system, having been logged in as an administrator or super administrator. Note that this feature can be accessed from any page where the administrator header is visible, identified by the blue circle in the image below.



Action: Click the button labeled "Volunteers" within the navigation bar, as outlined by the blue circle. The button is also identified with a white and green person icon.

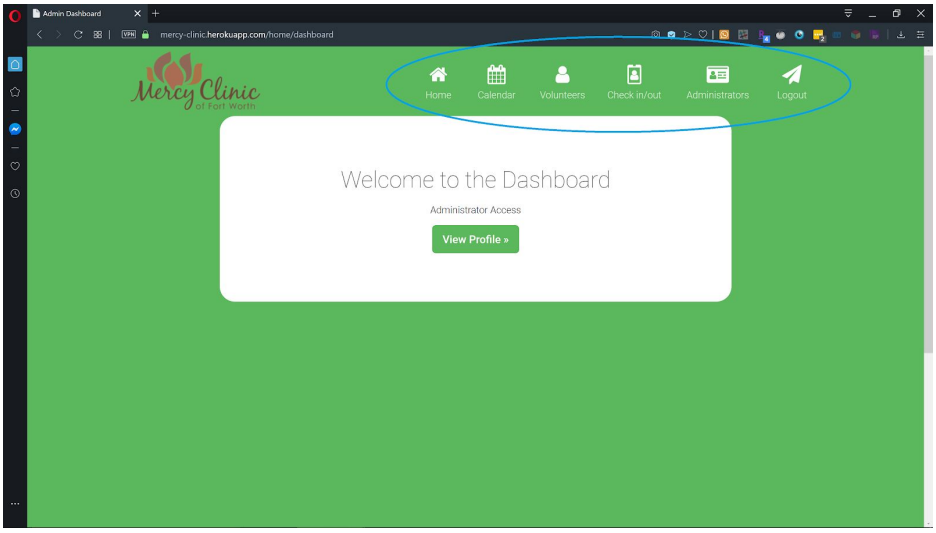
You will arrive at the Volunteers page, which provides a list of all the volunteers on the Mercy Clinic Volunteer System.



First	Last	Email	Phone	Department	Role	Hours	Edit	Delete
Nancy (Wilma)	Blevins			Medical	Clerical	View	Edit	Delete
Cynthia	Helton	c.helton@tcu.edu		Support	Accounting	View	Edit	Delete
Lorena	Montalvo	lorena.montalvo@travis.org		Support	Volunteer Coordinator	View	Edit	Delete
Paul	Blevins	pauldblevins@sbcglobal.net	817-371-9931	Medical		View	Edit	Delete
Christian	Ellis	christian@bondsellis.com		Support		View	Edit	Delete
Michele	Smith	m.g.smith@tcu.edu	817-692-7899	Support	Business Manager	View	Edit	Delete
Xavier	Vasquez	xavier_vasquez@yahoo.com		Support		View	Edit	Delete
Peggy	Leitch	peggyleitch@mercy-clinic.org	817-271-2003	Support	Executive Director	View	Edit	Delete
Jack	Keen	keenobg@hotmail.com	817-233-0001	Support	Medical Director	View	Edit	Delete
Rebekah	Naylor	r.naylor1944@sbcglobal.net	817-821-5789	Medical	Physician	View	Edit	Delete
Mark	Shelton	drmshelton@aol.com	817-715-7782	Medical	Physician	View	Edit	Delete
David	Watts	tinnto@aol.com	817-480-5241	Medical	Physician	View	Edit	Delete

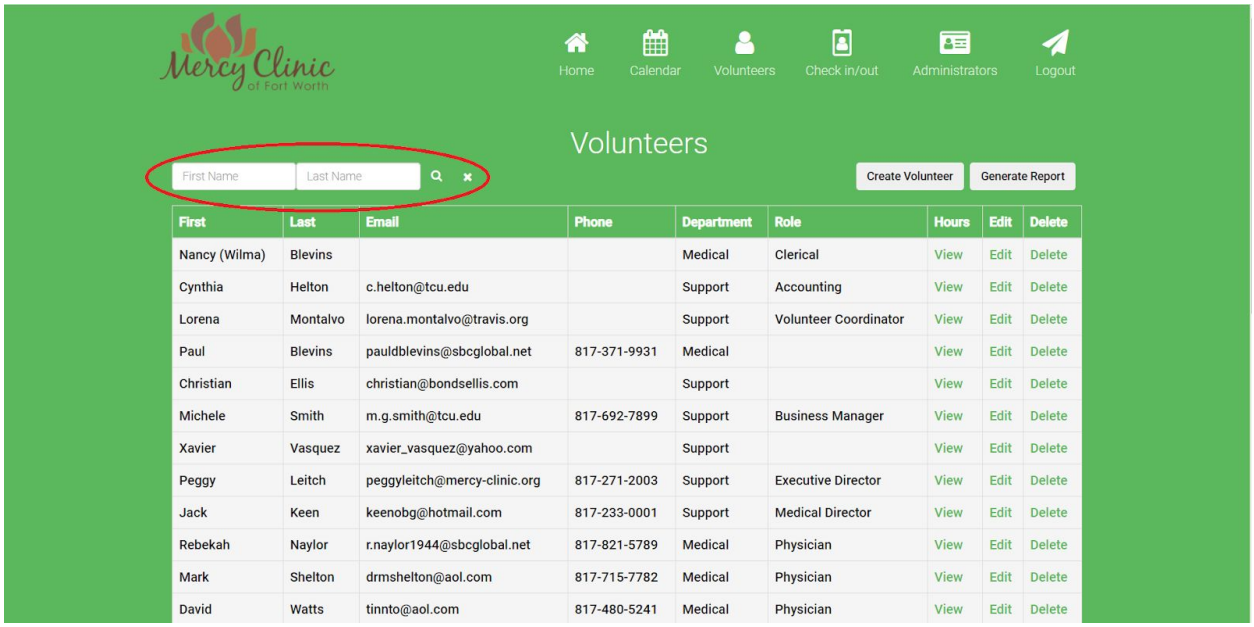
4.5.2. Volunteer Search

For the purpose of this manual, we are starting at the Dashboard page of the system, having been logged in as an administrator or super administrator. Note that this feature can be accessed from any page where the administrator header is visible, identified by the blue circle in the image below.

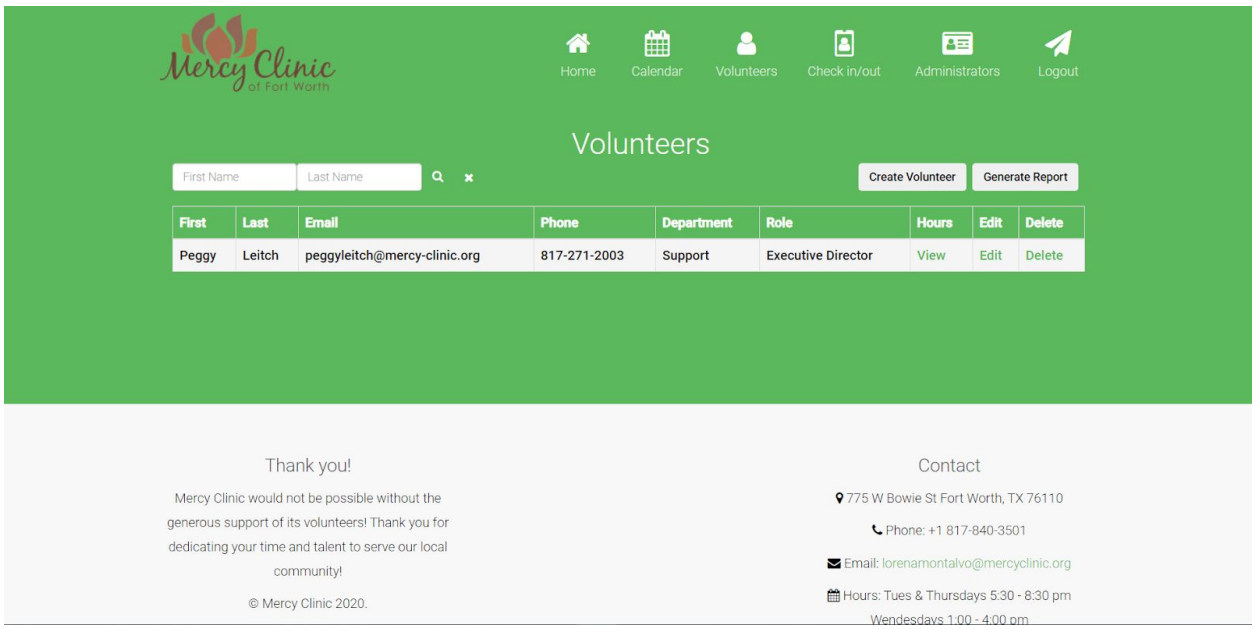


Action: Click the button labeled “Volunteers” within the navigation bar, as outlined by the blue circle. The button is also identified with a white and green person icon.

You will arrive at the Volunteers page, which provides a list of all the volunteers on the Mercy Clinic Volunteer System.

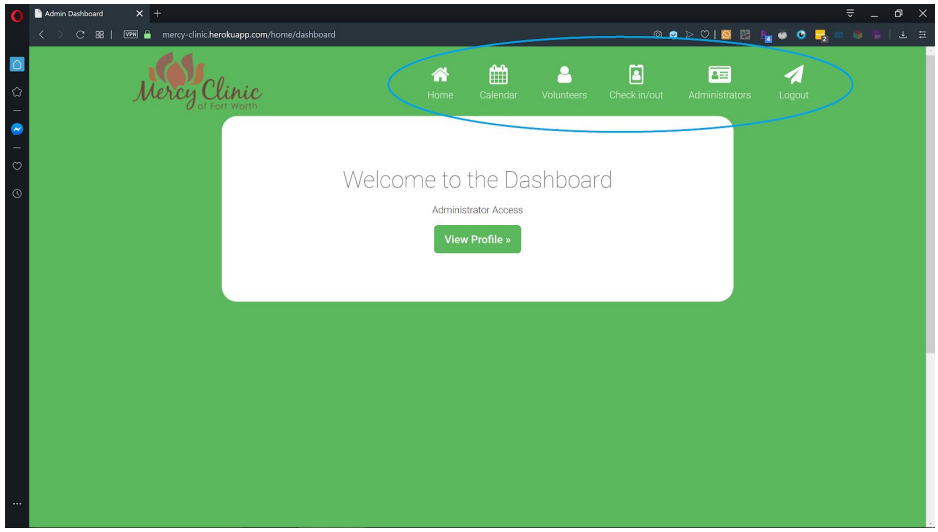


Action: One my type in the first name or last name of any volunteer in the system within the fields of the red circle. Once either the first name, last name, or both are filled out you may click the magnifying glass to limit the volunteer list to one of the volunteers who have the matching name.



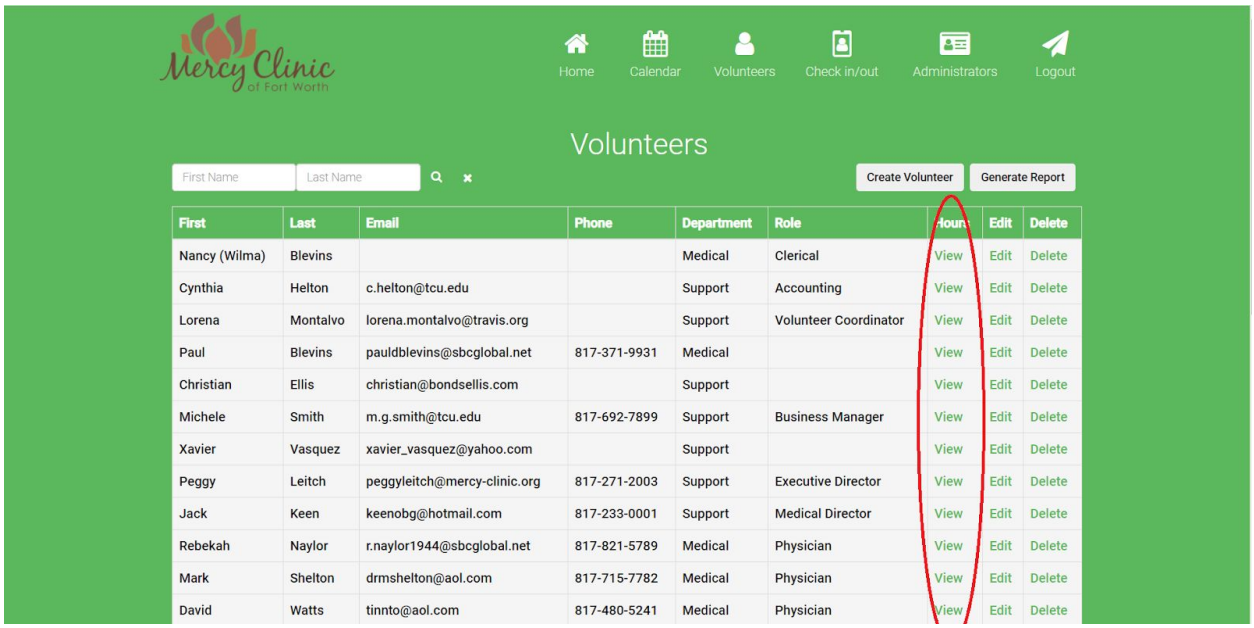
4.5.3. Volunteer View Hours

For the purpose of this manual, we are starting at the Dashboard page of the system, having been logged in as an administrator or super administrator. Note that this feature can be accessed from any page where the administrator header is visible, identified by the blue circle in the image below.



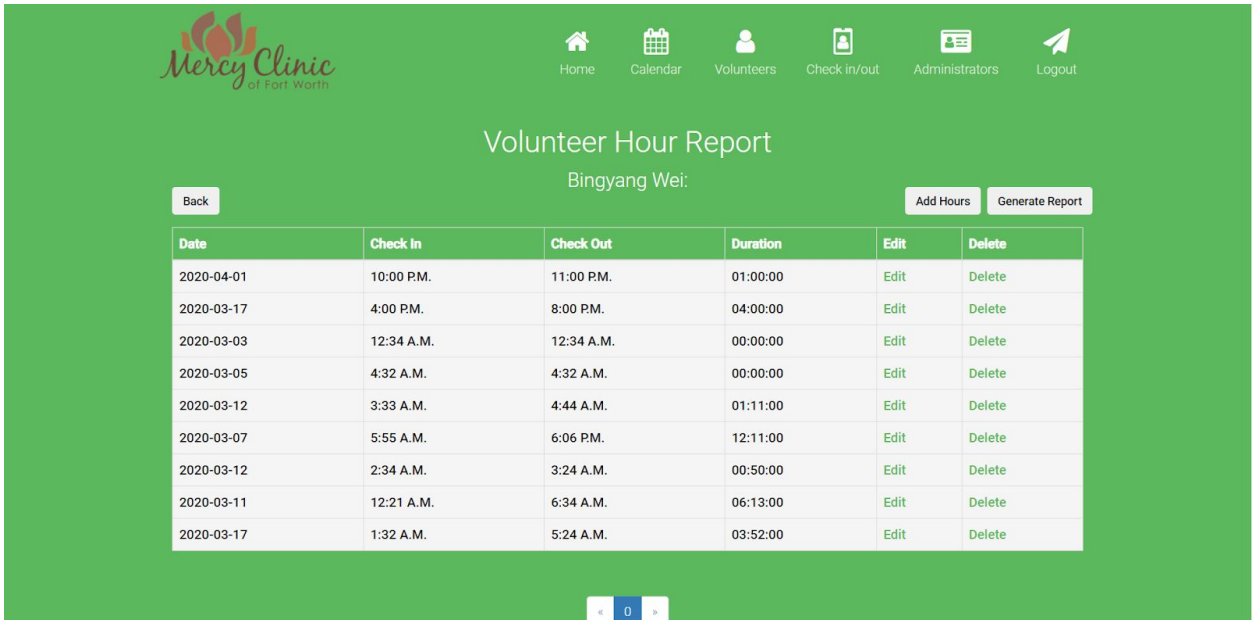
Action: Click the button labeled “Volunteers” within the navigation bar, as outlined by the blue circle. The button is also identified with a white and green person icon.

You will arrive at the Volunteers page, which provides a list of all the volunteers on the Mercy Clinic Volunteer System.



First	Last	Email	Phone	Department	Role	Hours	Edit	Delete
Nancy (Wilma)	Blevins			Medical	Clerical	View	Edit	Delete
Cynthia	Helton	c.helton@tcu.edu		Support	Accounting	View	Edit	Delete
Lorena	Montalvo	lorena.montalvo@travis.org		Support	Volunteer Coordinator	View	Edit	Delete
Paul	Blevins	pauldblevins@sbcglobal.net	817-371-9931	Medical		View	Edit	Delete
Christian	Ellis	christian@bondsellis.com		Support		View	Edit	Delete
Michele	Smith	m.g.smith@tcu.edu	817-692-7899	Support	Business Manager	View	Edit	Delete
Xavier	Vasquez	xavier_vasquez@yahoo.com		Support		View	Edit	Delete
Peggy	Leitch	peggyleitch@mercy-clinic.org	817-271-2003	Support	Executive Director	View	Edit	Delete
Jack	Keen	keenobg@hotmail.com	817-233-0001	Support	Medical Director	View	Edit	Delete
Rebekah	Naylor	r.naylor1944@sbcglobal.net	817-821-5789	Medical	Physician	View	Edit	Delete
Mark	Shelton	drmshelton@aol.com	817-715-7782	Medical	Physician	View	Edit	Delete
David	Watts	tinnto@aol.com	817-480-5241	Medical	Physician	View	Edit	Delete

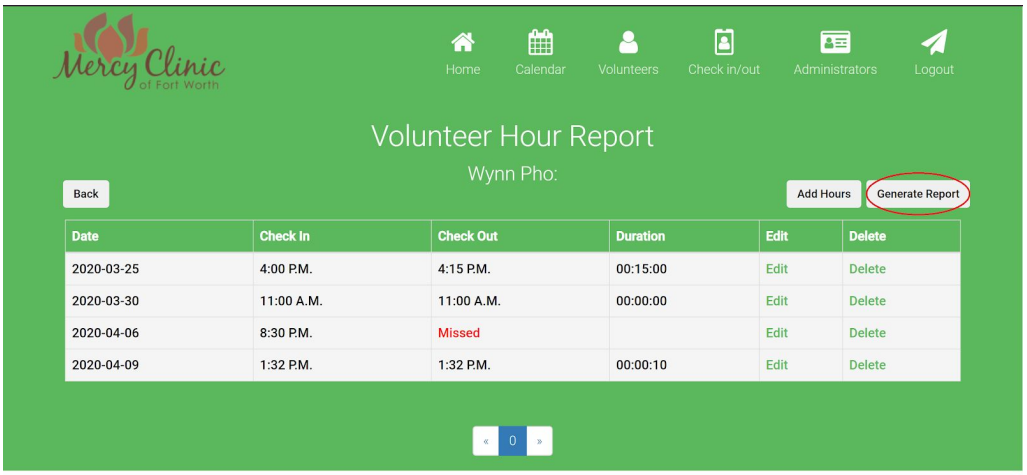
Action: To view the hours of a volunteer simply click the link labeled ‘View’ to the right of the desired volunteer’s name.



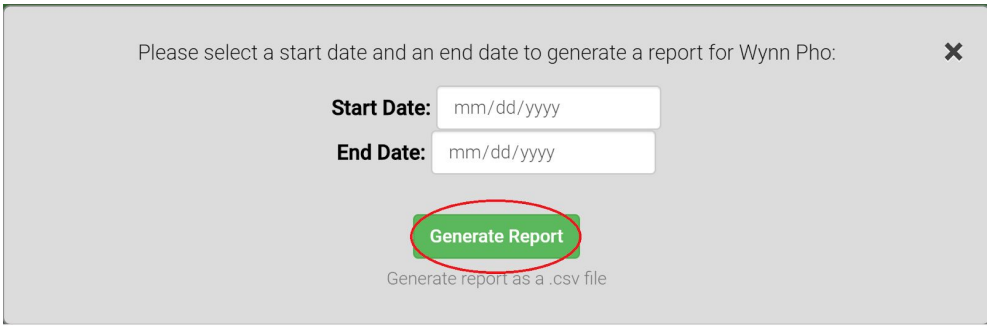
The result will be all the hours in the Mercy Clinics Volunteer System of the selected volunteer.

4.5.4. Generate Report For One Volunteer

To generate a report for one volunteer, please navigate to the volunteers detail page (see section 4.5.1)

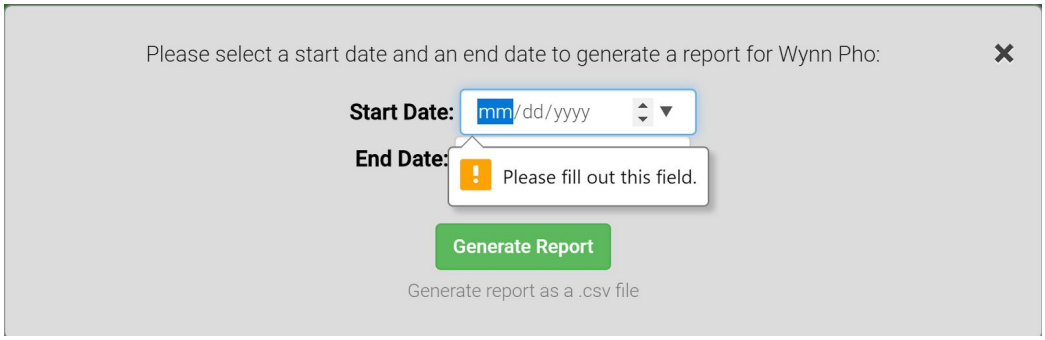


Action: Click the ‘Generate Report’ button circled in red within the image above.

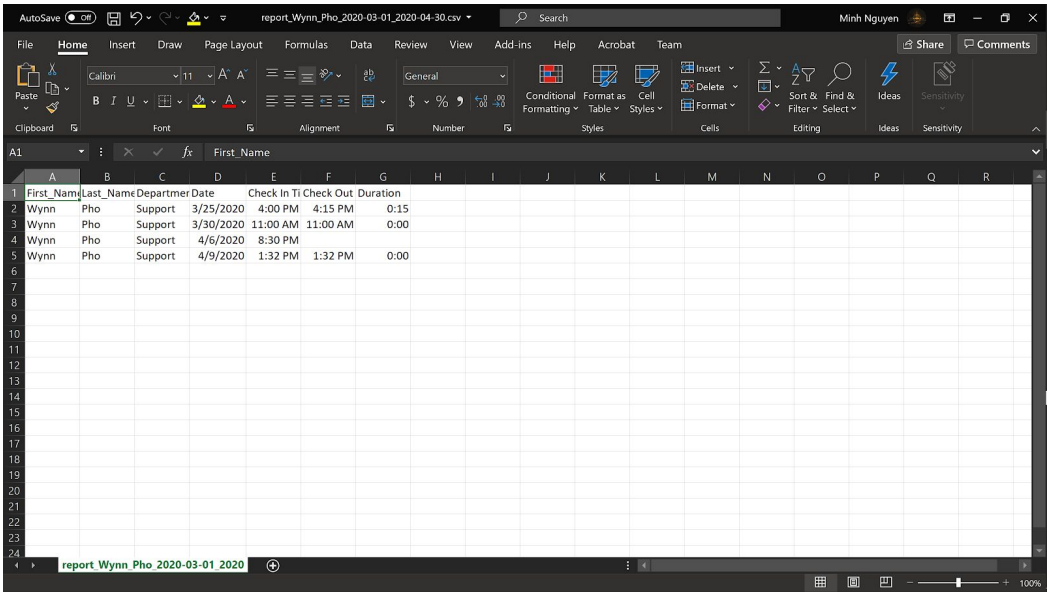


The system will pop up a window above for you to enter the necessary information to generate a report.

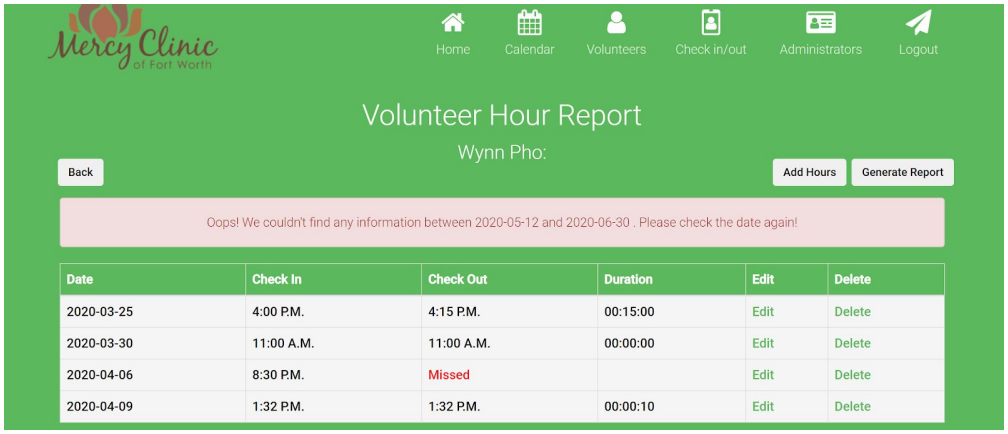
Action: Fill in the date and click “Generate Report” button circled in red in the image above.



Note: The “Start Date” and “End Date” fields are required to generate report. If you click “Generate Report” without filling one of those two fields or both fields, you will receive the message like the image above.



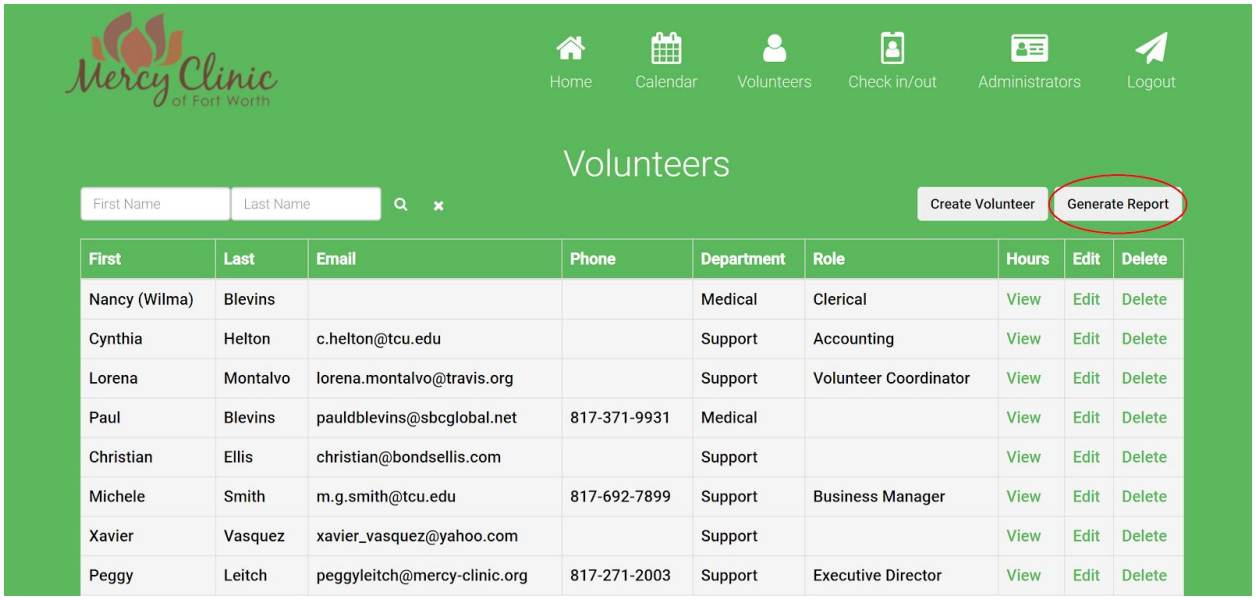
If the report is generated successfully, you will be prompted to download a .csv file. Open the file up, and it will be similar to the image above.



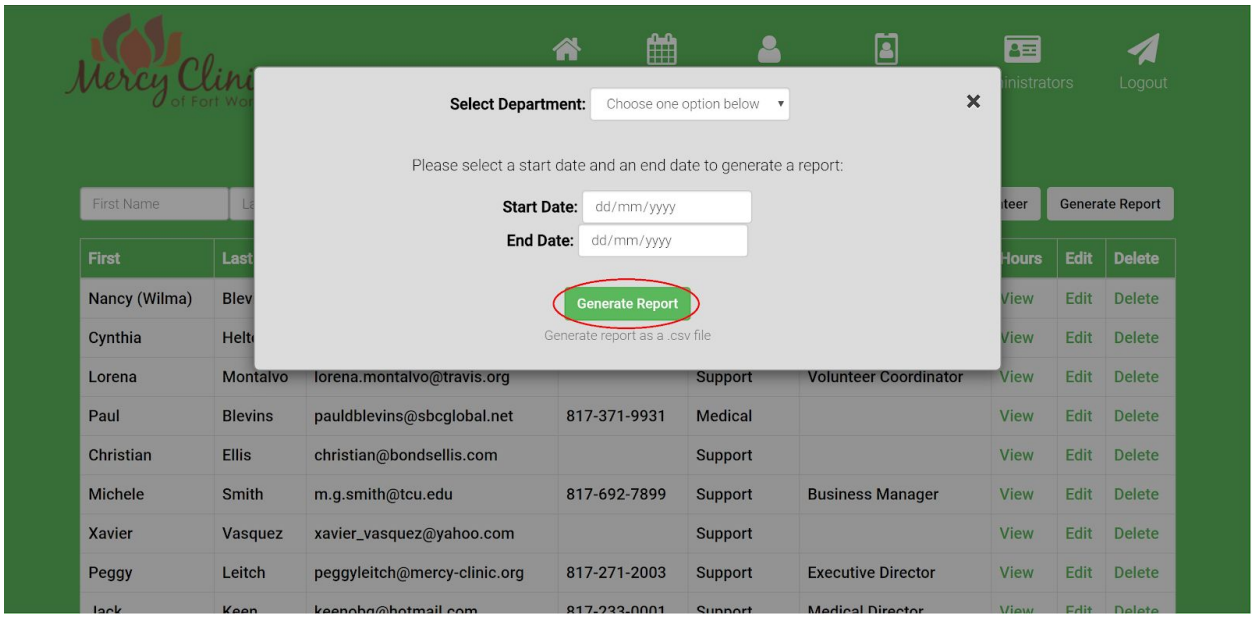
Otherwise, you will receive an error message similar to the image above

4.5.5. Generate Report For All Volunteers

To generate a report for all volunteers, please navigate to the volunteers page (see section 4.5.1).

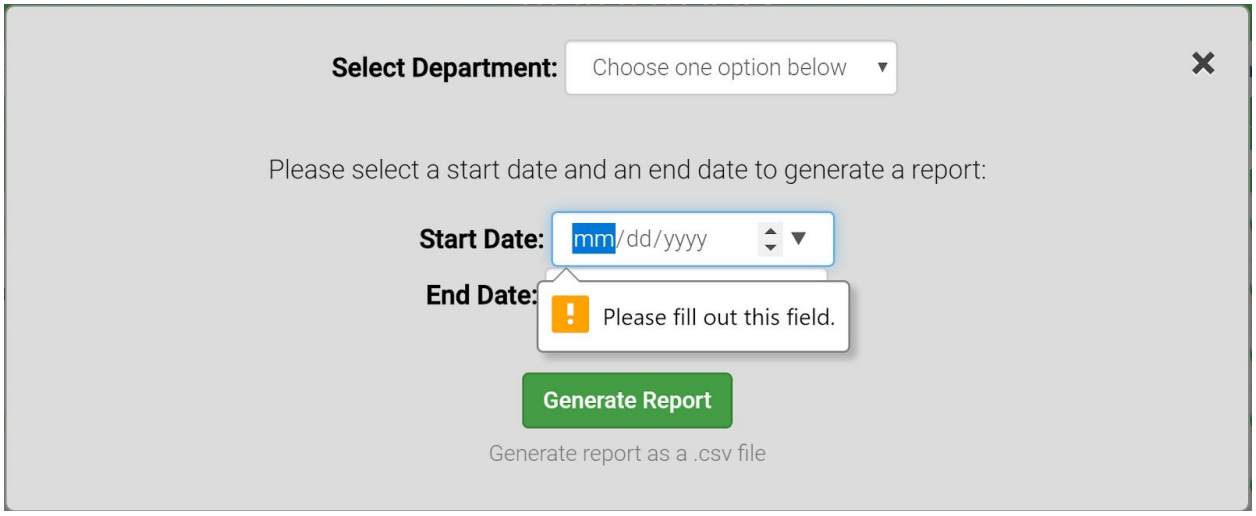


Action: Click the 'Generate Report' button circled in red within the image above.



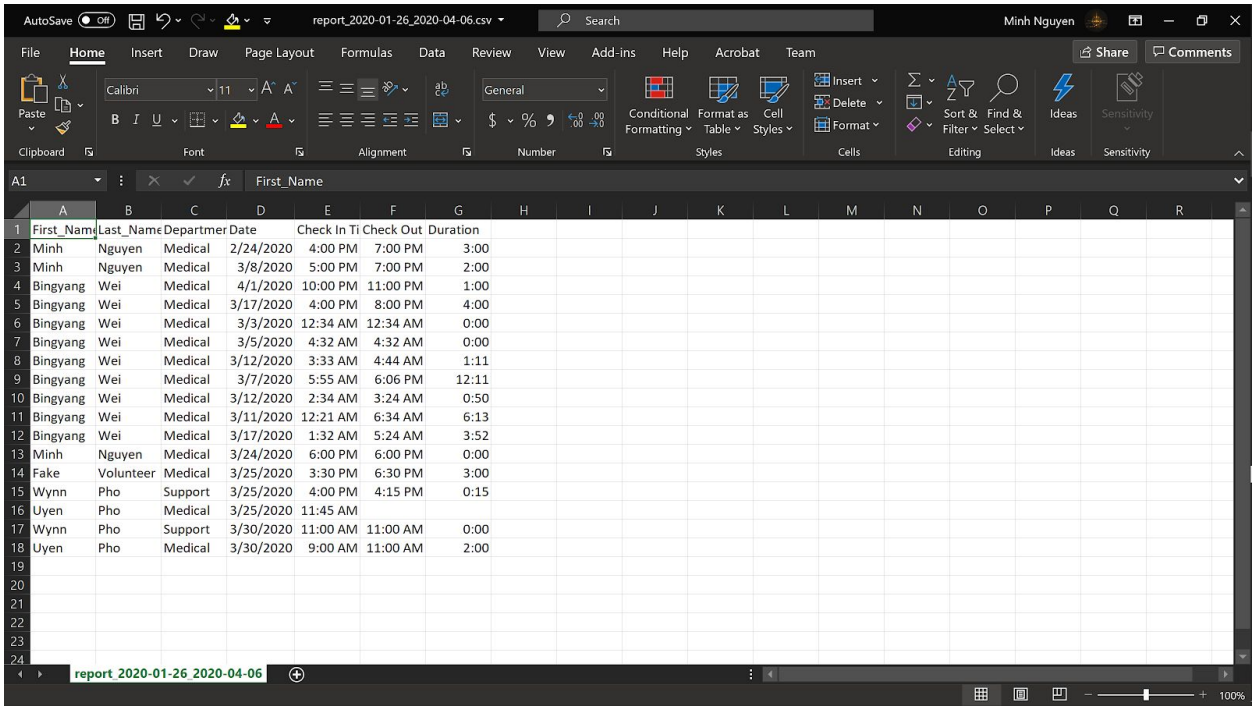
The system will pop up a window above for you to enter the necessary information to generate a report.

Action: Fill in the fields and click “Generate Report” button circled in red in the image above.



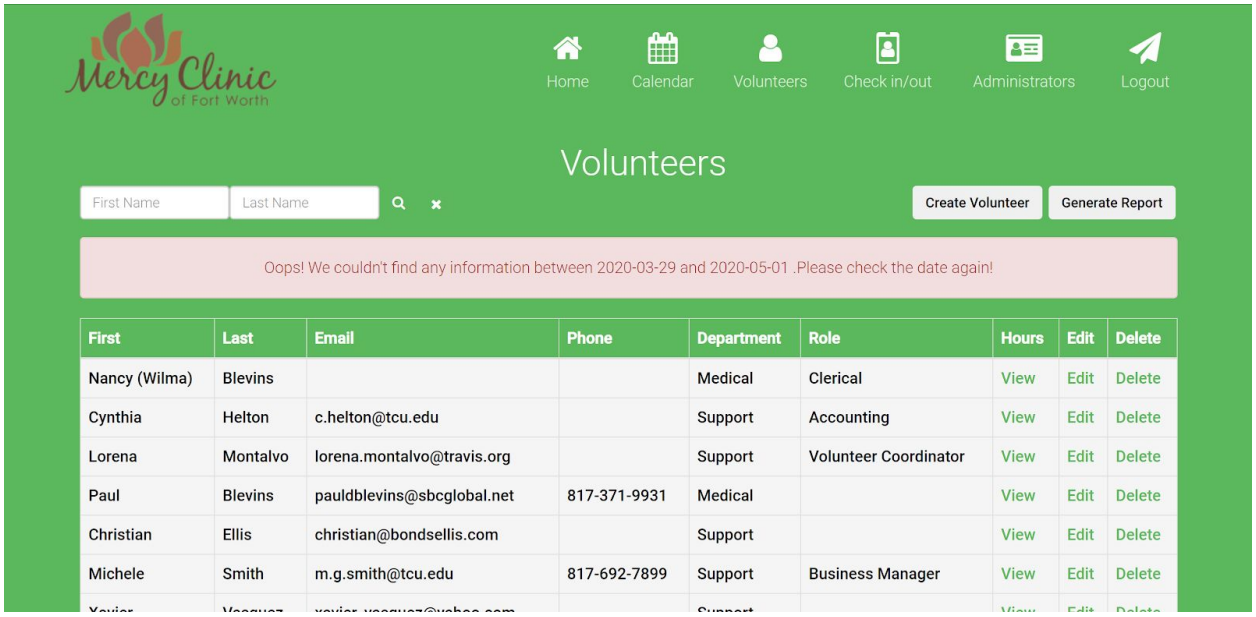
Note: The “Start Date” and “End Date” fields are required to generate report. If you click “Generate Report” without filling one of those two fields or both fields, you will receive the message like the image above.

If you did not select anything from the “Select Department” field, the system will automatically understands that you want to generate report for all volunteers regardless of their department. You can achieve the same goal by selecting option “All” in the “Select Department” field.



First_Name	Last_Name	Departmer	Date	Check In Ti	Check Out	Duration
Minh	Nguyen	Medical	2/24/2020	4:00 PM	7:00 PM	3:00
Minh	Nguyen	Medical	3/8/2020	5:00 PM	7:00 PM	2:00
Bingyang	Wei	Medical	4/1/2020	10:00 PM	11:00 PM	1:00
Bingyang	Wei	Medical	3/17/2020	4:00 PM	8:00 PM	4:00
Bingyang	Wei	Medical	3/3/2020	12:34 AM	12:34 AM	0:00
Bingyang	Wei	Medical	3/5/2020	4:32 AM	4:32 AM	0:00
Bingyang	Wei	Medical	3/12/2020	3:33 AM	4:44 AM	1:11
Bingyang	Wei	Medical	3/7/2020	5:55 AM	6:06 PM	12:11
Bingyang	Wei	Medical	3/12/2020	2:34 AM	3:24 AM	0:50
Bingyang	Wei	Medical	3/11/2020	12:21 AM	6:34 AM	6:13
Bingyang	Wei	Medical	3/17/2020	1:32 AM	5:24 AM	3:52
Minh	Nguyen	Medical	3/24/2020	6:00 PM	6:00 PM	0:00
Fake	Volunteer	Medical	3/25/2020	3:30 PM	6:30 PM	3:00
Wynn	Pho	Support	3/25/2020	4:00 PM	4:15 PM	0:15
Uyen	Pho	Medical	3/25/2020	11:45 AM		
Wynn	Pho	Support	3/30/2020	11:00 AM	11:00 AM	0:00
Uyen	Pho	Medical	3/30/2020	9:00 AM	11:00 AM	2:00

If the report is generated successfully, you will be prompted to download a .csv file. Open the file up, and it will be similar to the image above.

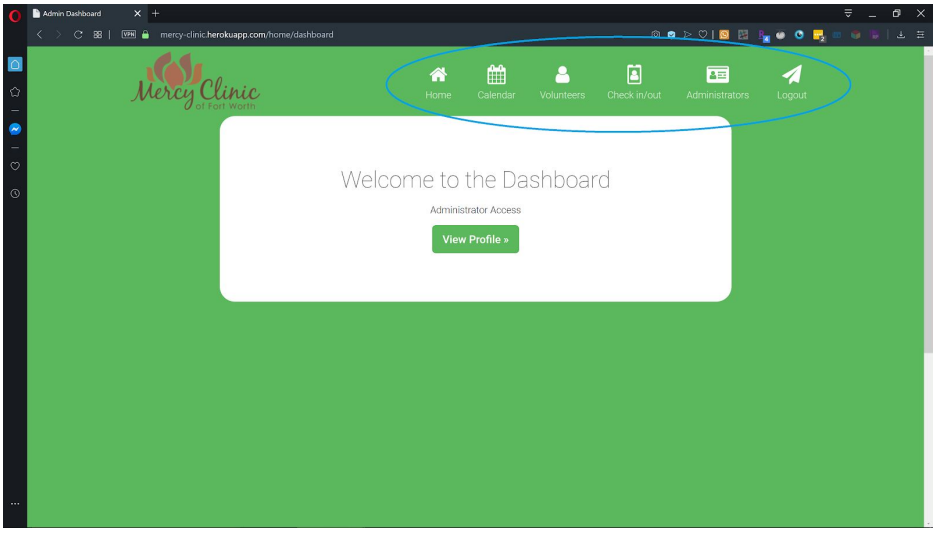


First	Last	Email	Phone	Department	Role	Hours	Edit	Delete
Nancy (Wilma)	Blevins			Medical	Clerical	View	Edit	Delete
Cynthia	Helton	c.helton@tcu.edu		Support	Accounting	View	Edit	Delete
Lorena	Montalvo	lorena.montalvo@travis.org		Support	Volunteer Coordinator	View	Edit	Delete
Paul	Blevins	pauldblevins@sbcglobal.net	817-371-9931	Medical		View	Edit	Delete
Christian	Ellis	christian@bondsellis.com		Support		View	Edit	Delete
Michele	Smith	m.g.smith@tcu.edu	817-692-7899	Support	Business Manager	View	Edit	Delete

Otherwise, you will receive an error message similar to the image above

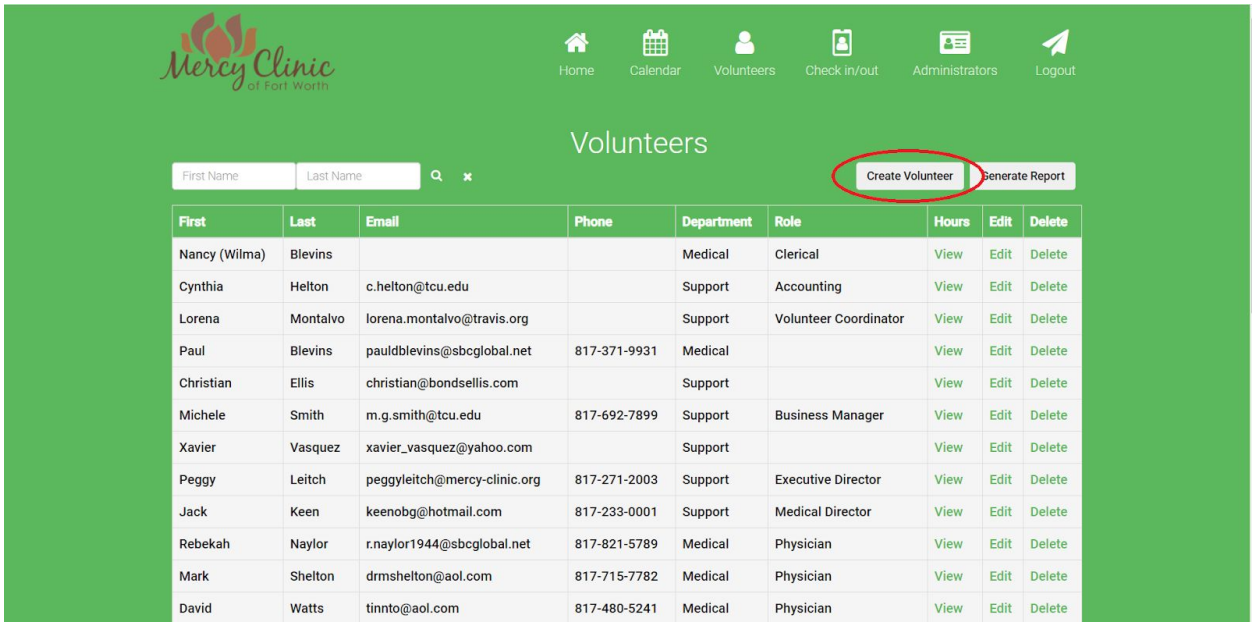
4.5.6. Create Volunteer

For the purpose of this manual, we are starting at the Dashboard page of the system, having been logged in as an administrator or super administrator. Note that this feature can be accessed from any page where the administrator header is visible, identified by the blue circle in the image below.



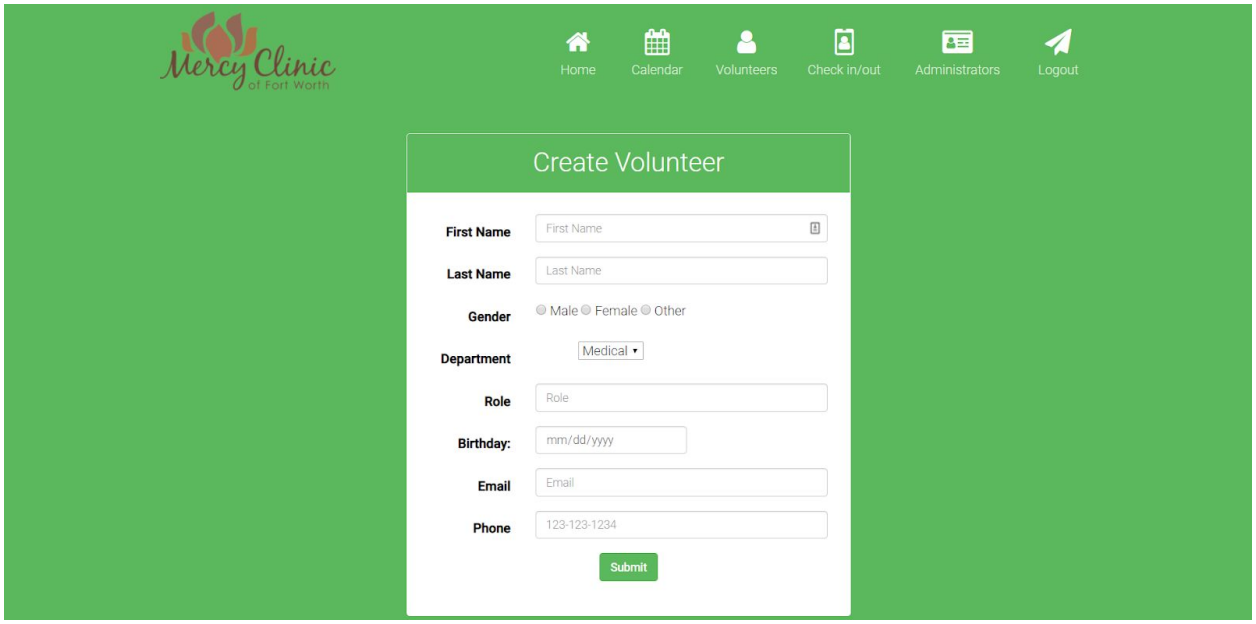
Action: Click the button labeled “Volunteers” within the navigation bar, as outlined by the blue circle. The button is also identified with a white and green person icon.

You will arrive at the Volunteers page, which provides a list of all the volunteers on the Mercy Clinic Volunteer System.

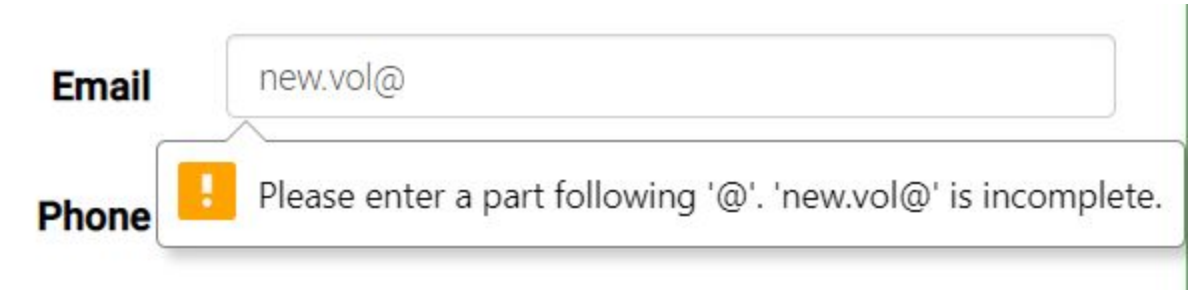


First	Last	Email	Phone	Department	Role	Hours	Edit	Delete
Nancy (Wilma)	Blevins			Medical	Clerical	View	Edit	Delete
Cynthia	Helton	c.helton@tcu.edu		Support	Accounting	View	Edit	Delete
Lorena	Montalvo	lorena.montalvo@travis.org		Support	Volunteer Coordinator	View	Edit	Delete
Paul	Blevins	pauldblevins@sbcglobal.net	817-371-9931	Medical		View	Edit	Delete
Christian	Ellis	christian@bondsellis.com		Support		View	Edit	Delete
Michele	Smith	m.g.smith@tcu.edu	817-692-7899	Support	Business Manager	View	Edit	Delete
Xavier	Vasquez	xavier_vasquez@yahoo.com		Support		View	Edit	Delete
Peggy	Leitch	peggyleitch@mercy-clinic.org	817-271-2003	Support	Executive Director	View	Edit	Delete
Jack	Keen	keenobg@hotmail.com	817-233-0001	Support	Medical Director	View	Edit	Delete
Rebekah	Naylor	r.naylor1944@sbcglobal.net	817-821-5789	Medical	Physician	View	Edit	Delete
Mark	Shelton	drmshelton@aol.com	817-715-7782	Medical	Physician	View	Edit	Delete
David	Watts	tinnto@aol.com	817-480-5241	Medical	Physician	View	Edit	Delete

Action: The admin then clicks the button in the top right of the volunteer listing page labeled “Create Volunteer”, which is indicated in the red circle.



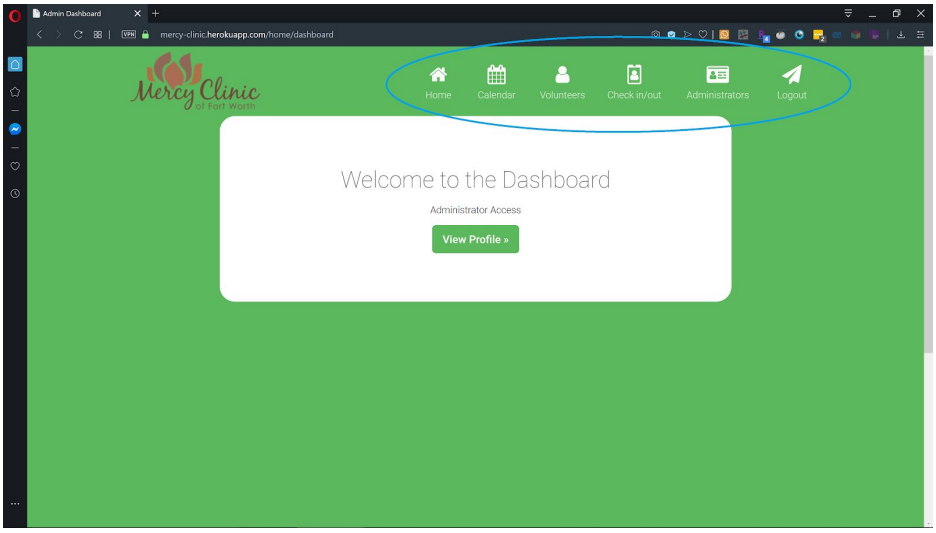
This takes the admin to a creation page, where they will then fill out all of the fields for the new volunteer. Each field has a simple format that the admin must follow inorder to create the new volunteer successfully. If the field is not filled out correctly it will look like this:



Once all of the fields are filled out correctly the admin then clicks the “Submit” button at the bottom of the form to finish creating the volunteer. It will then redirect them to the volunteer list page with a success message.

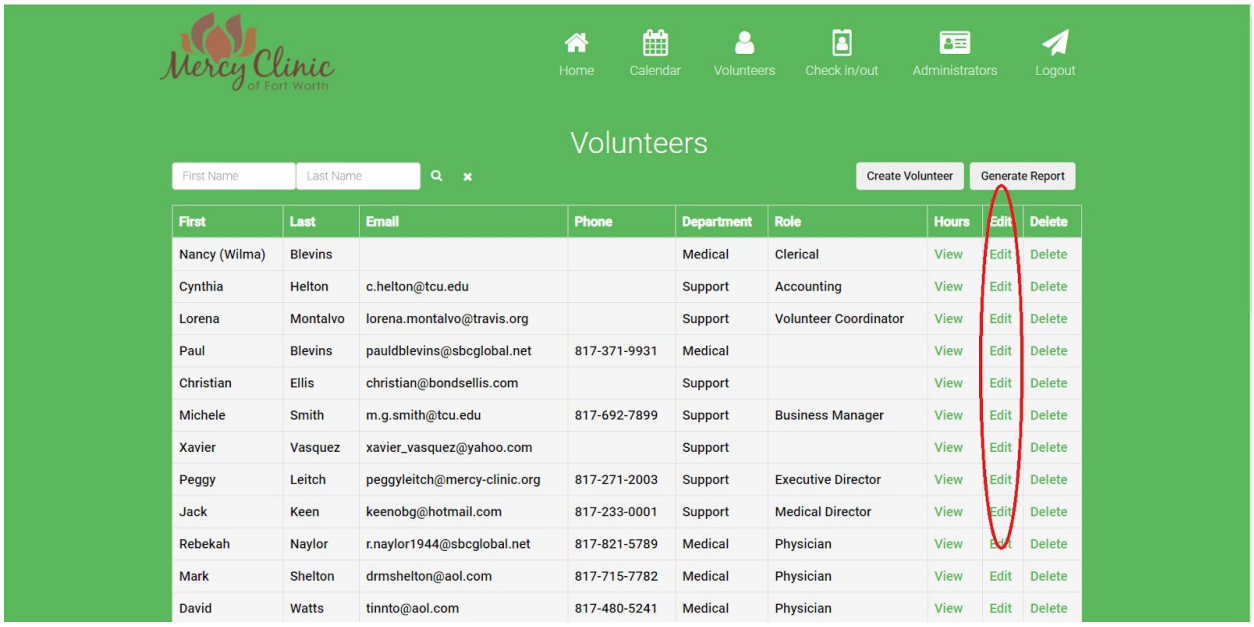
4.5.7. Edit Volunteer

For the purpose of this manual, we are starting at the Dashboard page of the system, having been logged in as an administrator or super administrator. Note that this feature can be accessed from any page where the administrator header is visible, identified by the blue circle in the image below.

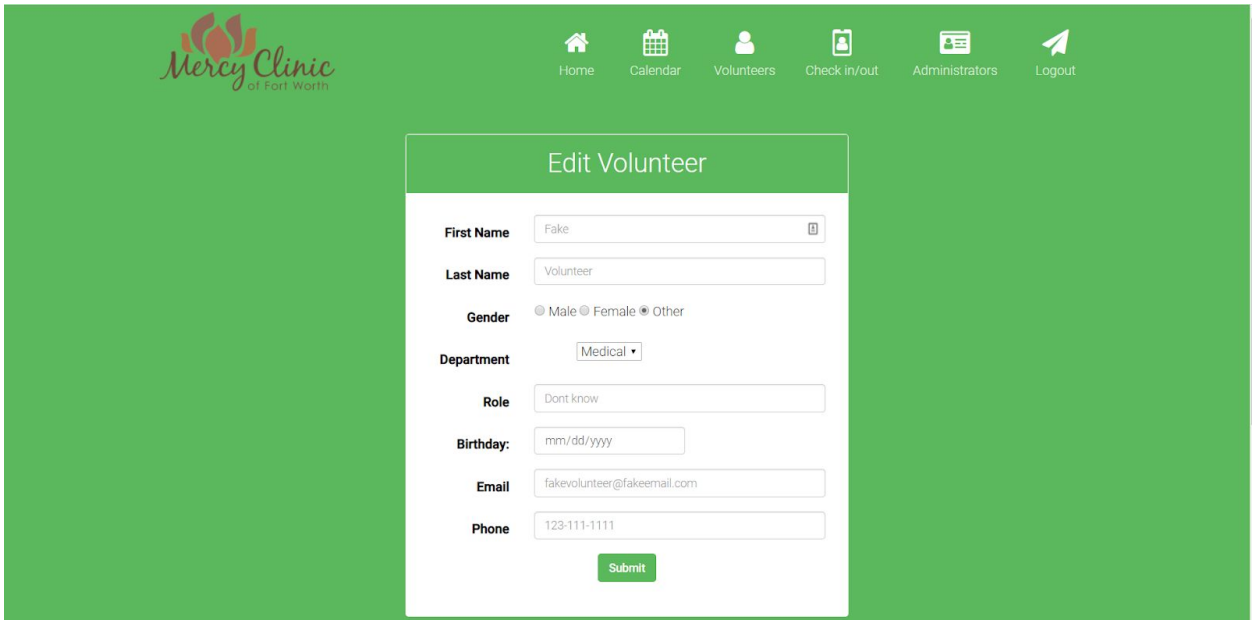


Action: Click the button labeled “Volunteers” within the navigation bar, as outlined by the blue circle. The button is also identified with a white and green person icon.

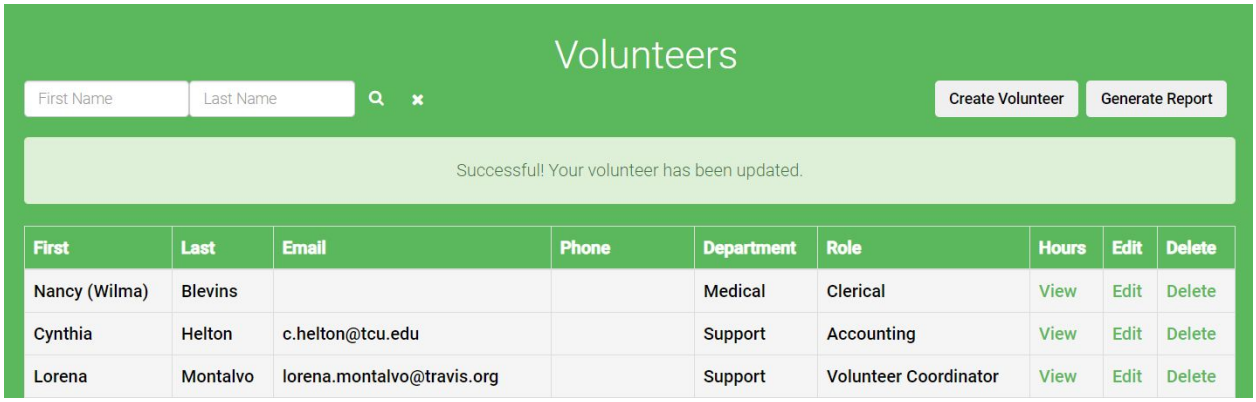
You will arrive at the Volunteers page, which provides a list of all the volunteers on the Mercy Clinic Volunteer System.



Action: To edit a volunteer simply click the link labeled ‘Edit’ to the right of the desired volunteer’s name.



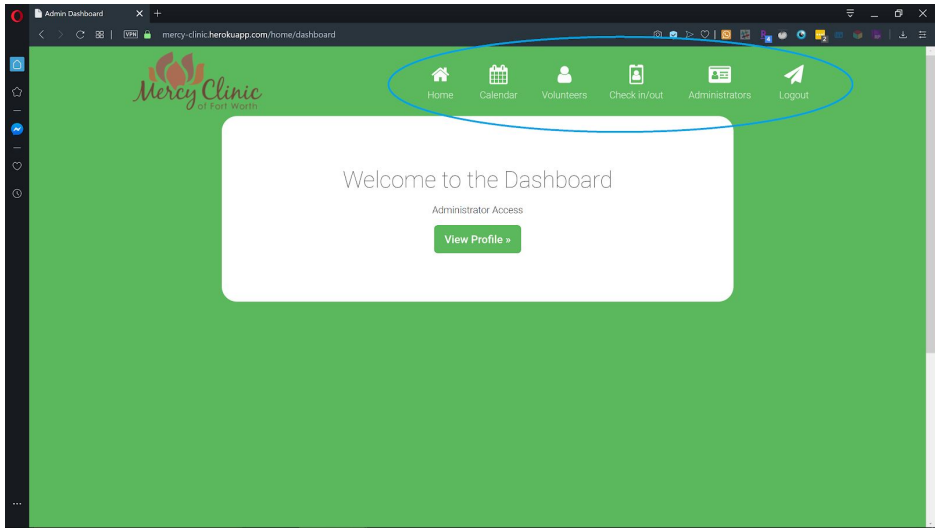
This will take the administrator to an edit page where the fields are populated with the desired user's information. The admin can edit all or only one of the fields to make a change. Once all of the desired changes are made the admin can click the 'Submit' button at the bottom of the form to save these changes.



The result is that the admin is redirected to the volunteer list page with a success message.

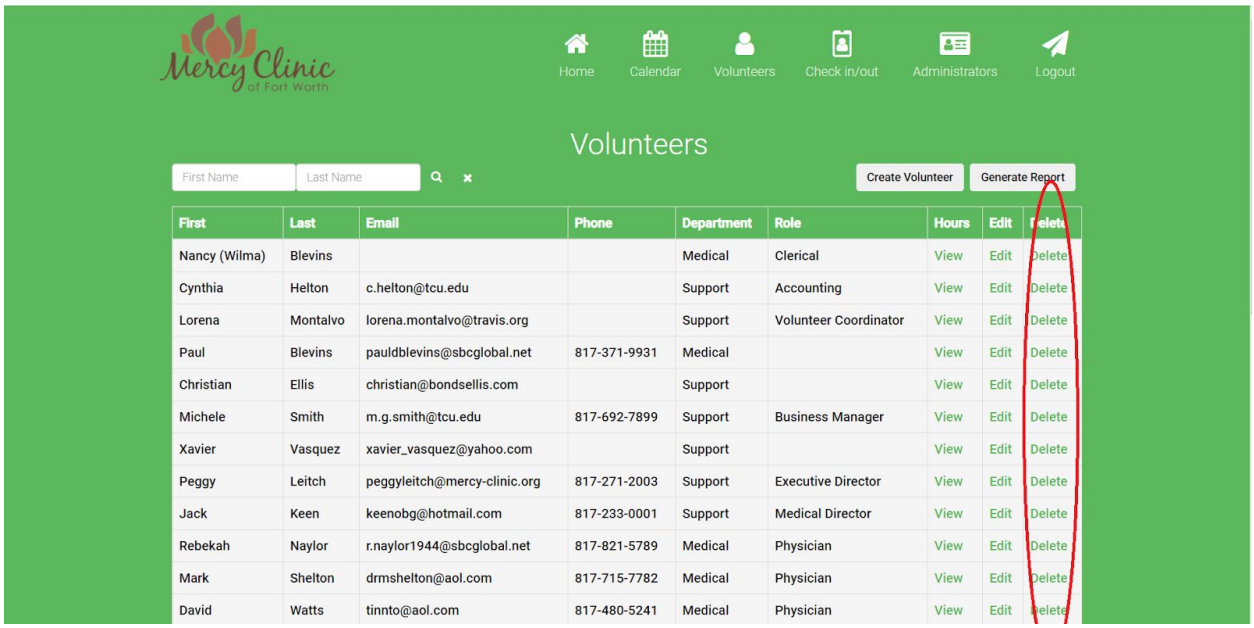
4.5.8. Delete Volunteer

For the purpose of this manual, we are starting at the Dashboard page of the system, having been logged in as an administrator or super administrator. Note that this feature can be accessed from any page where the administrator header is visible, identified by the blue circle in the image below.



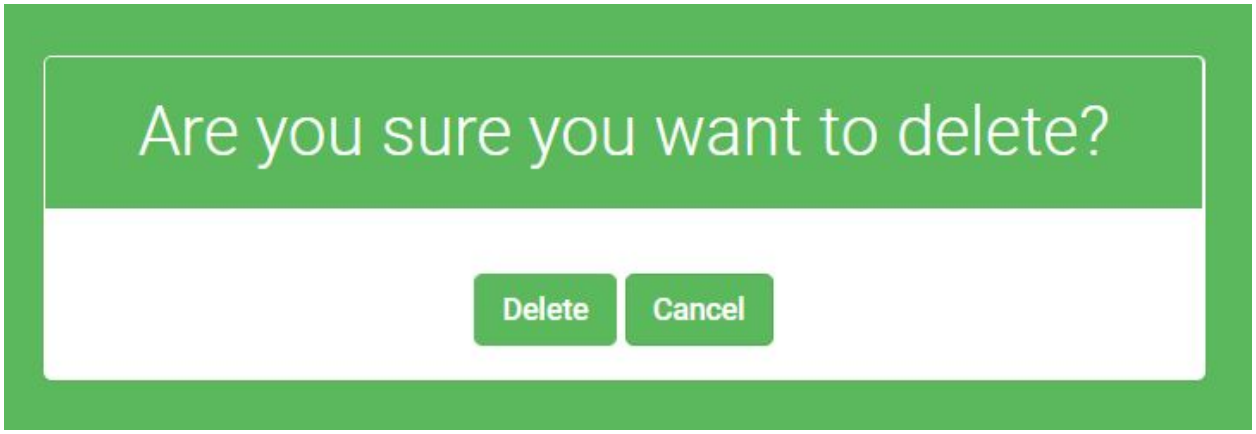
Action: Click the button labeled “Volunteers” within the navigation bar, as outlined by the blue circle. The button is also identified with a white and green person icon.

You will arrive at the Volunteers page, which provides a list of all the volunteers on the Mercy Clinic Volunteer System.



First	Last	Email	Phone	Department	Role	Hours	Edit	Delete
Nancy (Wilma)	Blevins			Medical	Clerical	View	Edit	Delete
Cynthia	Helton	c.helton@tcu.edu		Support	Accounting	View	Edit	Delete
Lorena	Montalvo	lorena.montalvo@travis.org		Support	Volunteer Coordinator	View	Edit	Delete
Paul	Blevins	pauldblevins@sbcglobal.net	817-371-9931	Medical		View	Edit	Delete
Christian	Ellis	christian@bondsellis.com		Support		View	Edit	Delete
Michele	Smith	m.g.smith@tcu.edu	817-692-7899	Support	Business Manager	View	Edit	Delete
Xavier	Vasquez	xavier_vasquez@yahoo.com		Support		View	Edit	Delete
Peggy	Leitch	peggyleitch@mercy-clinic.org	817-271-2003	Support	Executive Director	View	Edit	Delete
Jack	Keen	keenobg@hotmail.com	817-233-0001	Support	Medical Director	View	Edit	Delete
Rebekah	Naylor	r.naylor1944@sbcglobal.net	817-821-5789	Medical	Physician	View	Edit	Delete
Mark	Shelton	drmshelton@aol.com	817-715-7782	Medical	Physician	View	Edit	Delete
David	Watts	tinnto@aol.com	817-480-5241	Medical	Physician	View	Edit	Delete

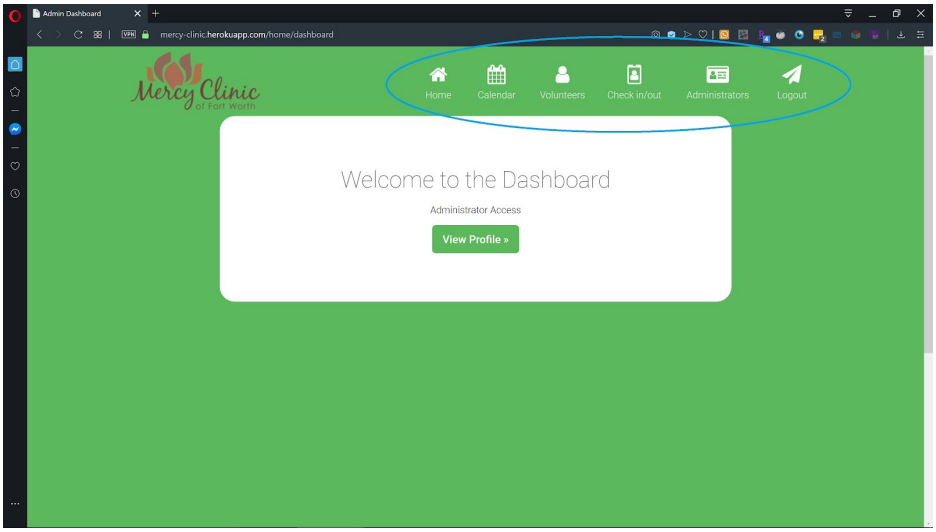
Action: To delete a volunteer simply click the link labeled ‘Delete’ to the right of the desired volunteer’s name. This will take the admin to a confirmation page.



If the admin clicks ‘Cancel’ it will take them back to the volunteer list page without deleting a volunteer. If the admin clicks ‘Delete’ then it will delete the volunteer and take them back to the volunteer list page.

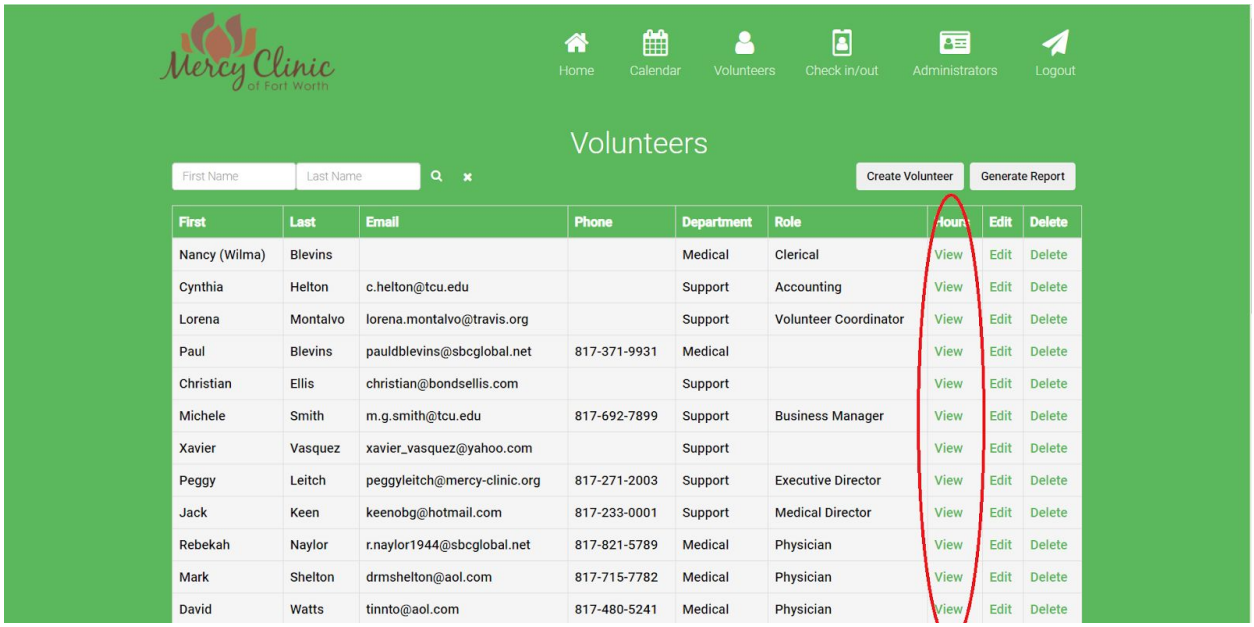
4.5.9. Volunteer Add Hours

For the purpose of this manual, we are starting at the Dashboard page of the system, having been logged in as an administrator or super administrator. Note that this feature can be accessed from any page where the administrator header is visible, identified by the blue circle in the image below.

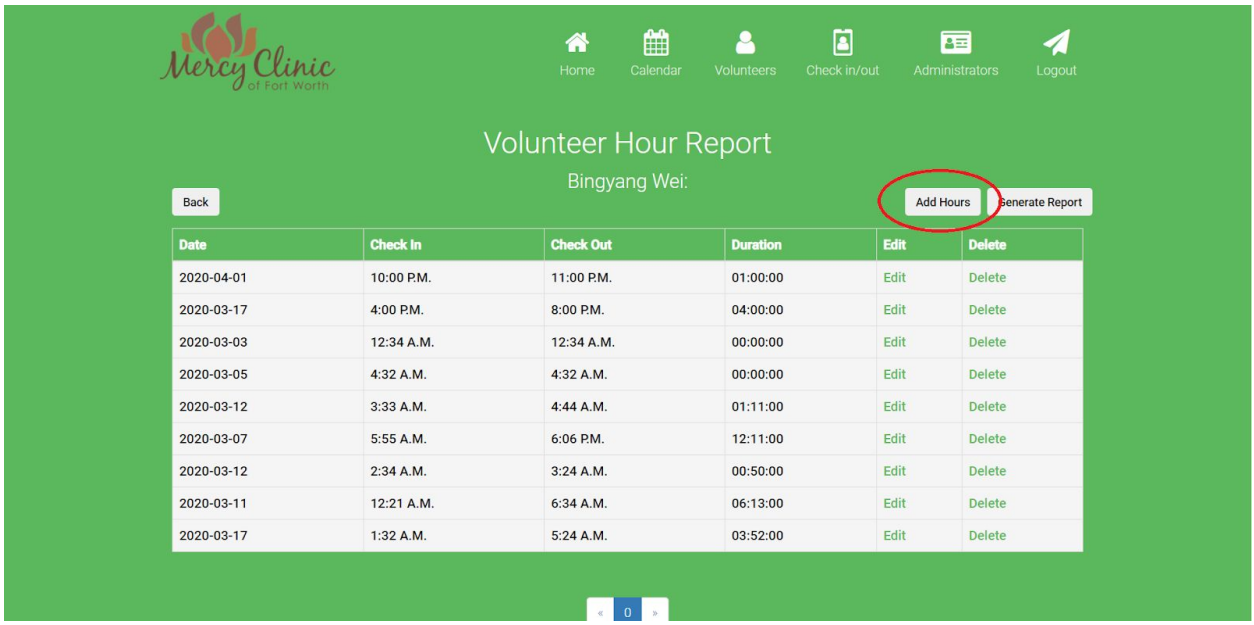


Action: Click the button labeled “Volunteers” within the navigation bar, as outlined by the blue circle. The button is also identified with a white and green person icon.

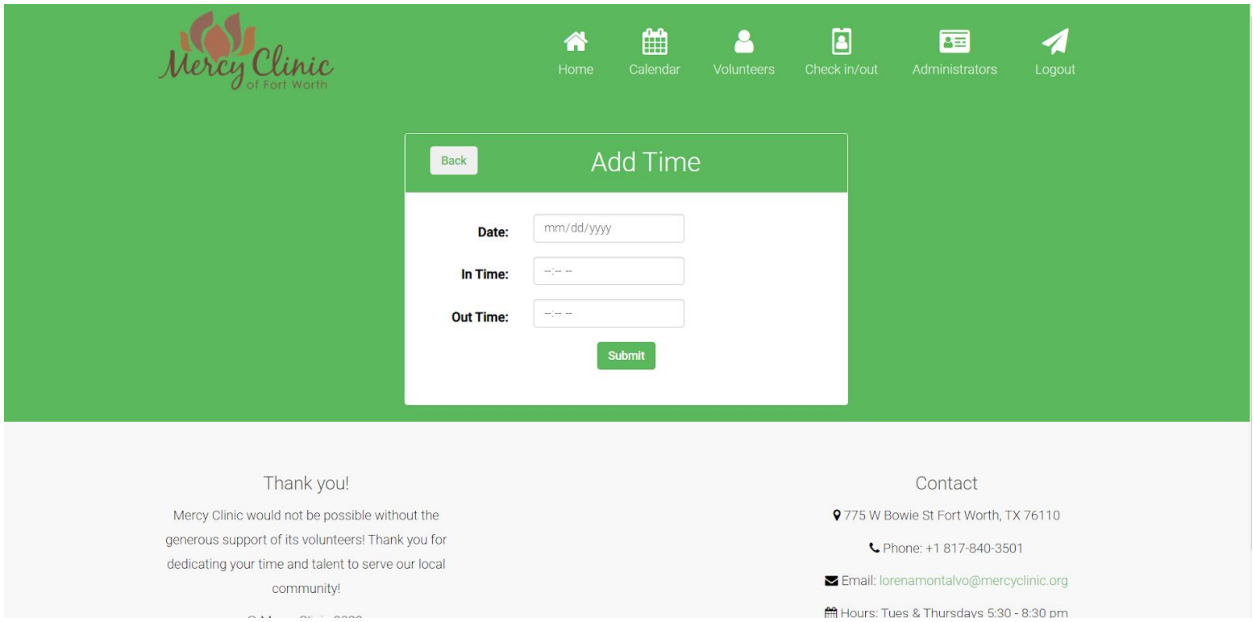
You will arrive at the Volunteers page, which provides a list of all the volunteers on the Mercy Clinic Volunteer System.



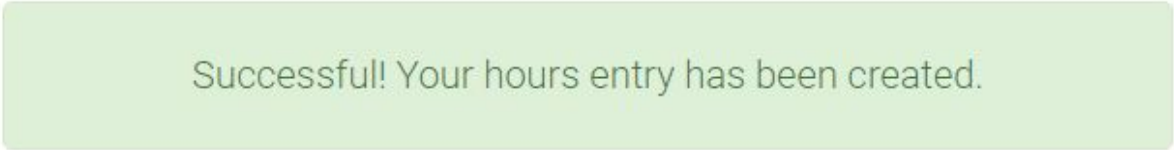
Action: Click the ‘View’ link on which volunteer you want to add hours to. This will take you to a page where all of the selected volunteer’s hours will be displayed.



Action: Select the ‘Add Hours’ button at the top right corner of the page. This will take the admin to a new form required to create a new hours listing.

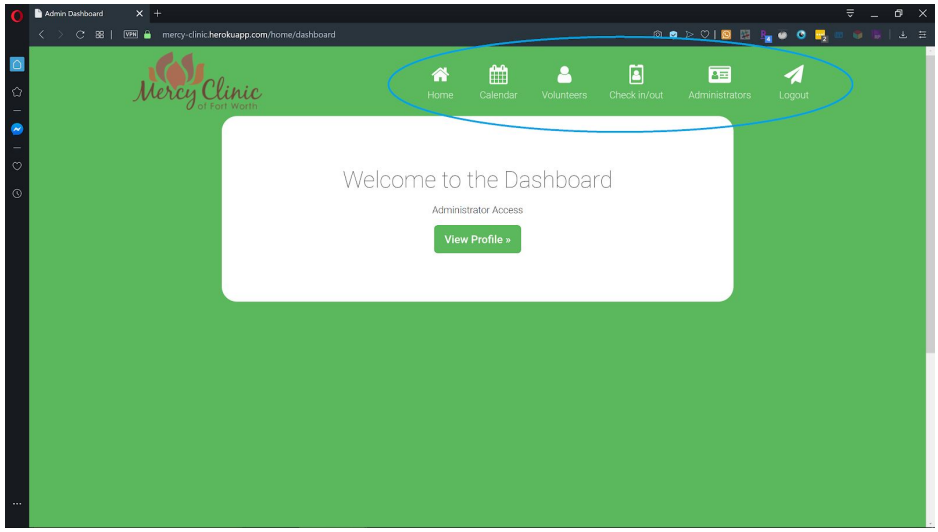


The admin will then fill out all of the fields in the form with the new hour's information. Then they will click 'Submit'. This will hour the new hours to Mercy Clinics System, and it will display a success message.



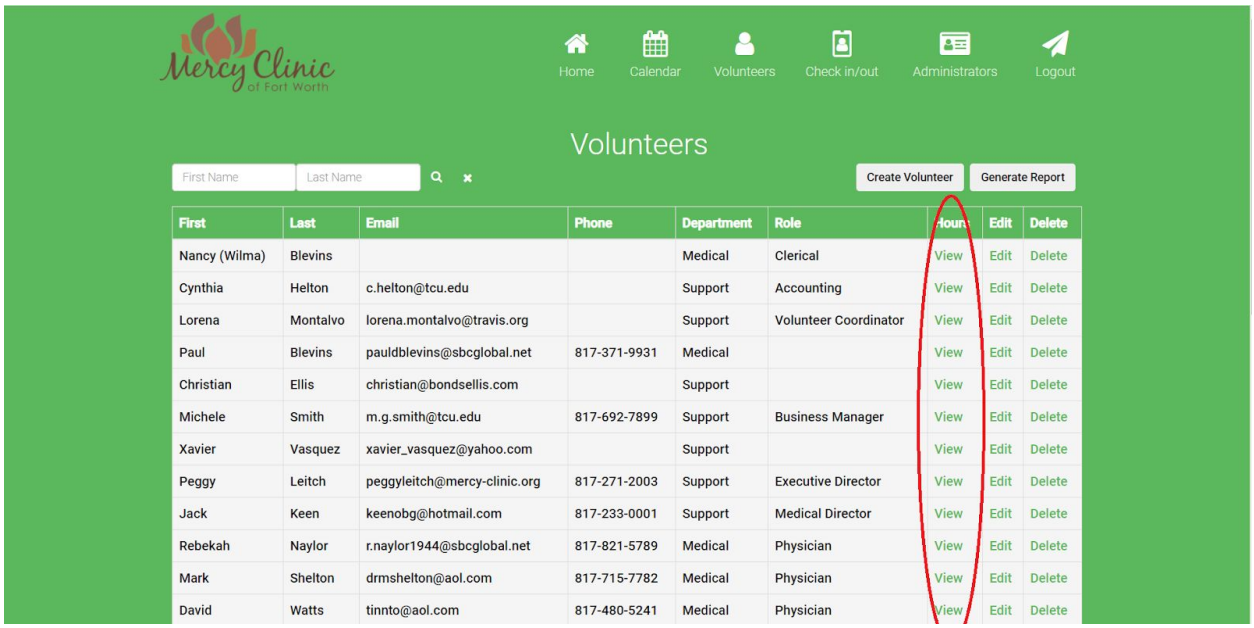
4.5.10. Volunteer Edit Hours

For the purpose of this manual, we are starting at the Dashboard page of the system, having been logged in as an administrator or super administrator. Note that this feature can be accessed from any page where the administrator header is visible, identified by the blue circle in the image below.



Action: Click the button labeled “Volunteers” within the navigation bar, as outlined by the blue circle. The button is also identified with a white and green person icon.

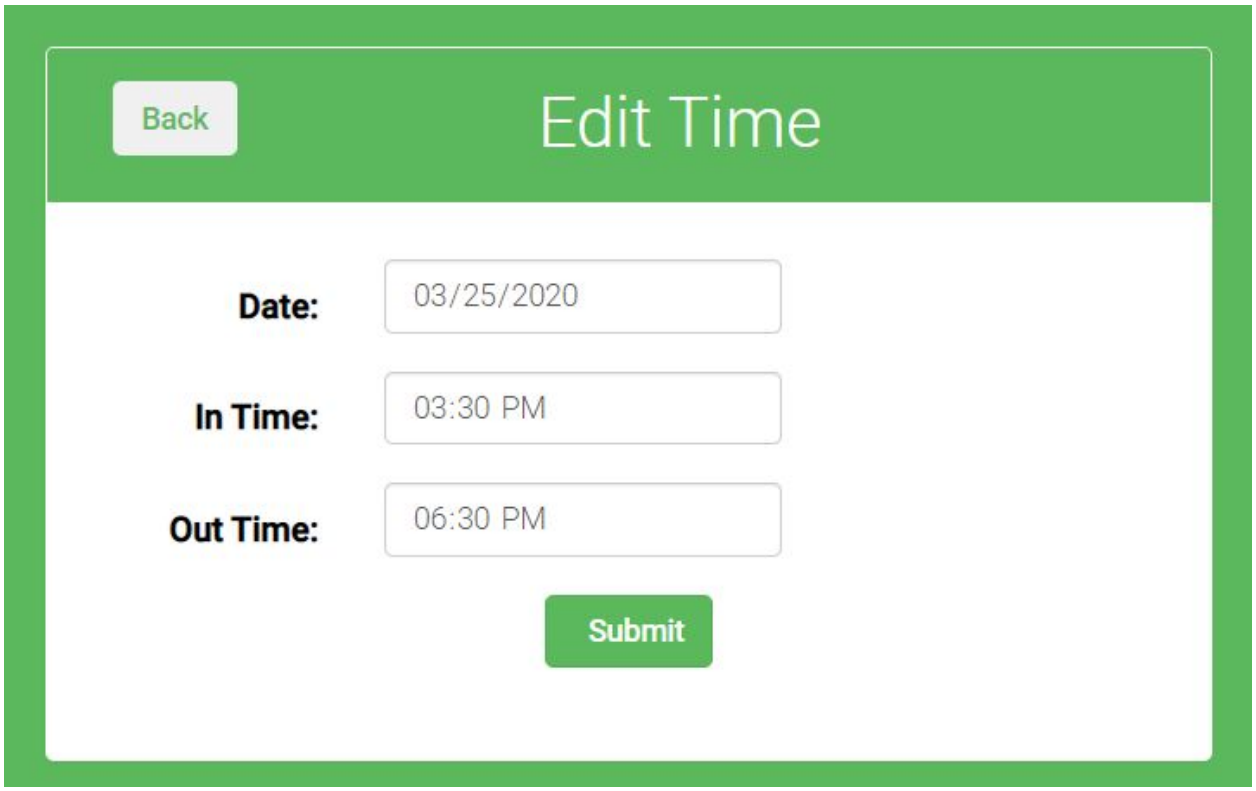
You will arrive at the Volunteers page, which provides a list of all the volunteers on the Mercy Clinic Volunteer System.



First	Last	Email	Phone	Department	Role	Hours	Edit	Delete
Nancy (Wilma)	Blevins			Medical	Clerical	View	Edit	Delete
Cynthia	Helton	c.helton@tcu.edu		Support	Accounting	View	Edit	Delete
Lorena	Montalvo	lorena.montalvo@travis.org		Support	Volunteer Coordinator	View	Edit	Delete
Paul	Blevins	pauldblevins@sbcglobal.net	817-371-9931	Medical		View	Edit	Delete
Christian	Ellis	christian@bondsellis.com		Support		View	Edit	Delete
Michele	Smith	m.g.smith@tcu.edu	817-692-7899	Support	Business Manager	View	Edit	Delete
Xavier	Vasquez	xavier_vasquez@yahoo.com		Support		View	Edit	Delete
Peggy	Leitch	peggyleitch@mercy-clinic.org	817-271-2003	Support	Executive Director	View	Edit	Delete
Jack	Keen	keenobg@hotmail.com	817-233-0001	Support	Medical Director	View	Edit	Delete
Rebekah	Naylor	r.naylor1944@sbcglobal.net	817-821-5789	Medical	Physician	View	Edit	Delete
Mark	Shelton	drmshelton@aol.com	817-715-7782	Medical	Physician	View	Edit	Delete
David	Watts	tinnto@aol.com	817-480-5241	Medical	Physician	View	Edit	Delete

Action: Click the ‘View’ link on which volunteer you want to edit hours for. This will take you to a page where all of the selected volunteer’s hours will be displayed.

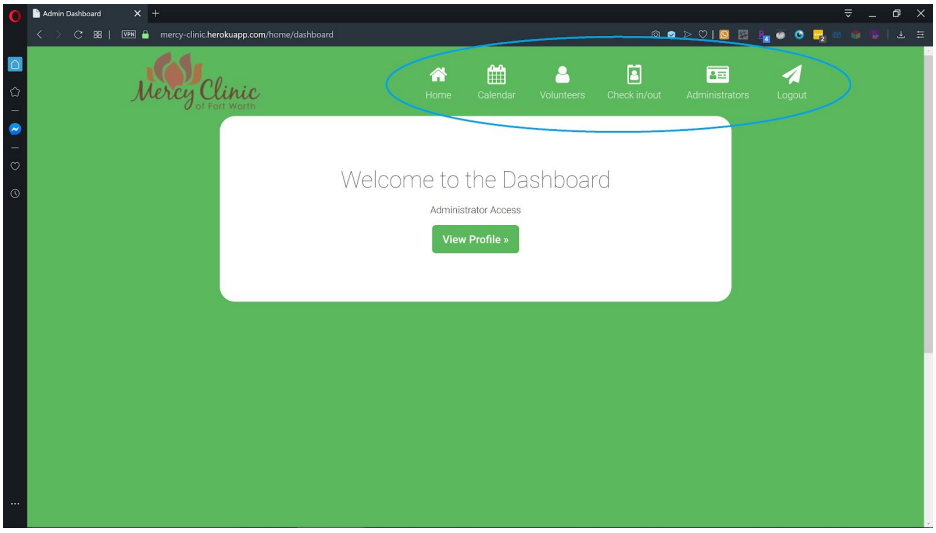
The admin will then click the 'Edit' link to the right of the hours they want to edit. This will take them to a form where the hours information will populate the fields.



Once all of the desired changes are made the admin can click the 'Submit' button at the bottom of the form to save these changes.

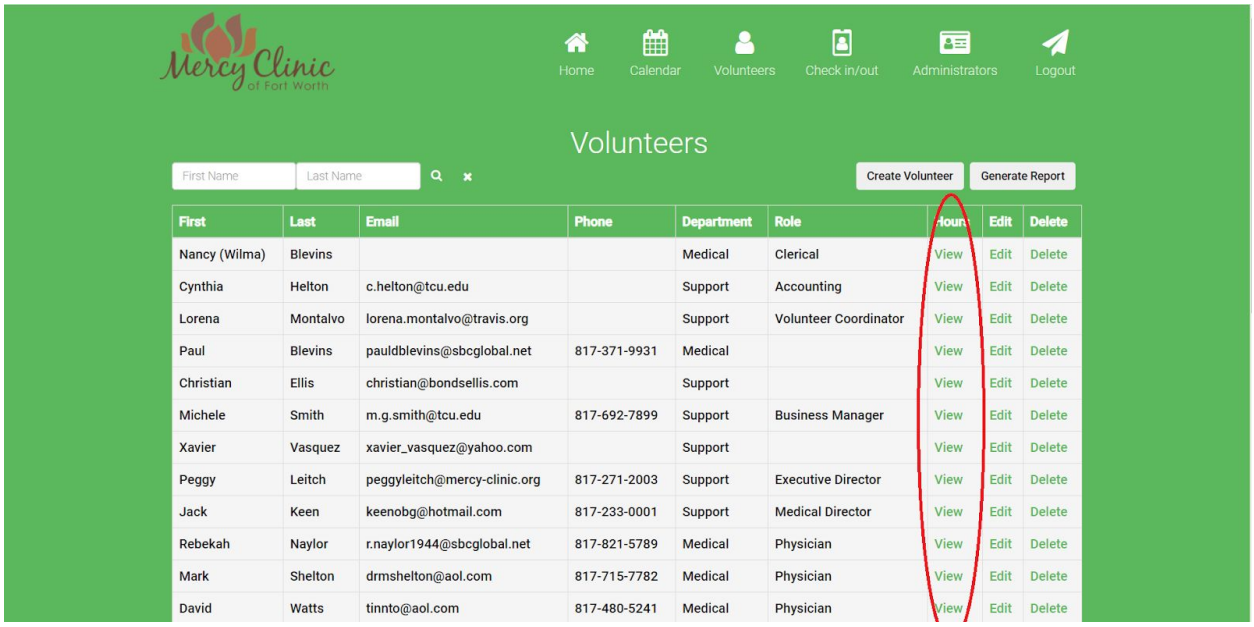
4.5.11. Volunteer Delete Hours

For the purpose of this manual, we are starting at the Dashboard page of the system, having been logged in as an administrator or super administrator. Note that this feature can be accessed from any page where the administrator header is visible, identified by the blue circle in the image below.



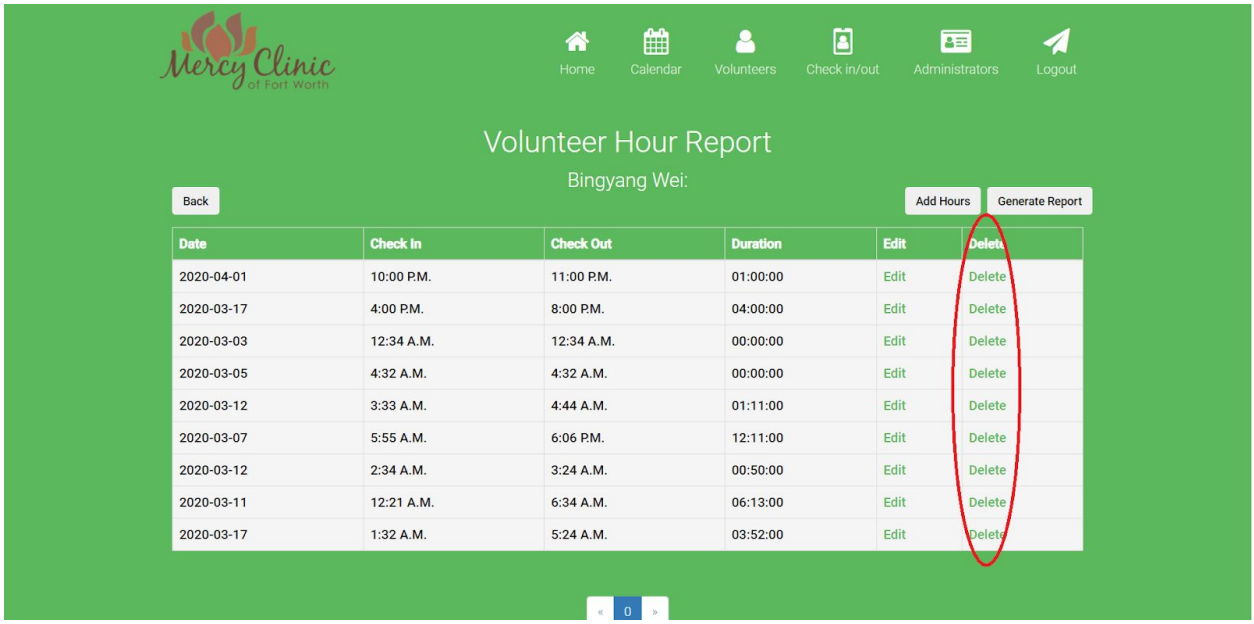
Action: Click the button labeled “Volunteers” within the navigation bar, as outlined by the blue circle. The button is also identified with a white and green person icon.

You will arrive at the Volunteers page, which provides a list of all the volunteers on the Mercy Clinic Volunteer System.

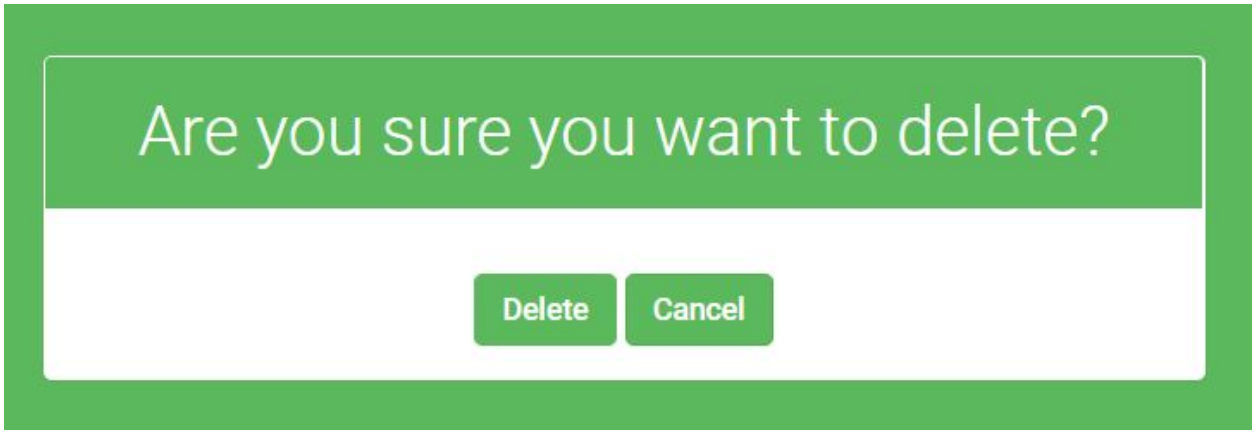


First	Last	Email	Phone	Department	Role	Hours	Edit	Delete
Nancy (Wilma)	Blevins			Medical	Clerical	View	Edit	Delete
Cynthia	Helton	c.helton@tcu.edu		Support	Accounting	View	Edit	Delete
Lorena	Montalvo	lorena.montalvo@travis.org		Support	Volunteer Coordinator	View	Edit	Delete
Paul	Blevins	pauldblevins@sbcglobal.net	817-371-9931	Medical		View	Edit	Delete
Christian	Ellis	christian@bondsellis.com		Support		View	Edit	Delete
Michele	Smith	m.g.smith@tcu.edu	817-692-7899	Support	Business Manager	View	Edit	Delete
Xavier	Vasquez	xavier_vasquez@yahoo.com		Support		View	Edit	Delete
Peggy	Leitch	peggyleitch@mercy-clinic.org	817-271-2003	Support	Executive Director	View	Edit	Delete
Jack	Keen	keenobg@hotmail.com	817-233-0001	Support	Medical Director	View	Edit	Delete
Rebekah	Naylor	r.naylor1944@sbcglobal.net	817-821-5789	Medical	Physician	View	Edit	Delete
Mark	Shelton	drmshelton@aol.com	817-715-7782	Medical	Physician	View	Edit	Delete
David	Watts	tinnto@aol.com	817-480-5241	Medical	Physician	View	Edit	Delete

Action: Click the ‘View’ link on which volunteer you want to edit hours for. This will take you to a page where all of the selected volunteer’s hours will be displayed.



Action: To delete a volunteer's hours simply click the link labeled 'Delete' to the right of the desired hours. This will take the admin to a confirmation page.

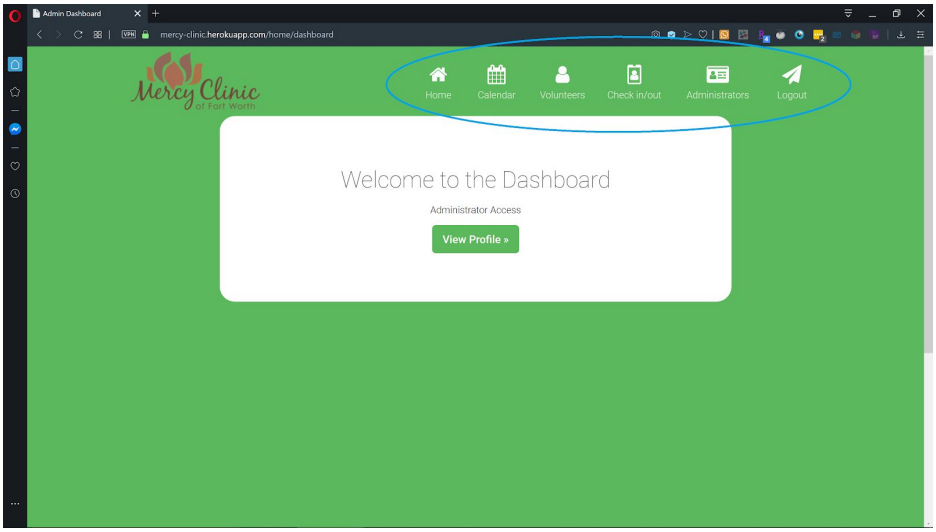


If the admin clicks 'Cancel' it will take them back to the volunteer's hour list page without deleting the selected hours. If the admin clicks 'Delete' then it will delete the selected hours and take them back to the volunteer's hour list page.

4.6. Check In / Check Out System

The Check In / Check Out System gives volunteers the ability to check in/check out when they arrive at/leave the clinic. It then keeps a record of their hours which can be accessed in the Volunteer System (see section 4.5.3). The Check In / Check Out System is best displayed on a tablet device on which volunteers enter their information.

The Check In / Out System can be accessed by clicking the “Check in/out” tab within the navigation bar at the top of the website when an admin has logged in.

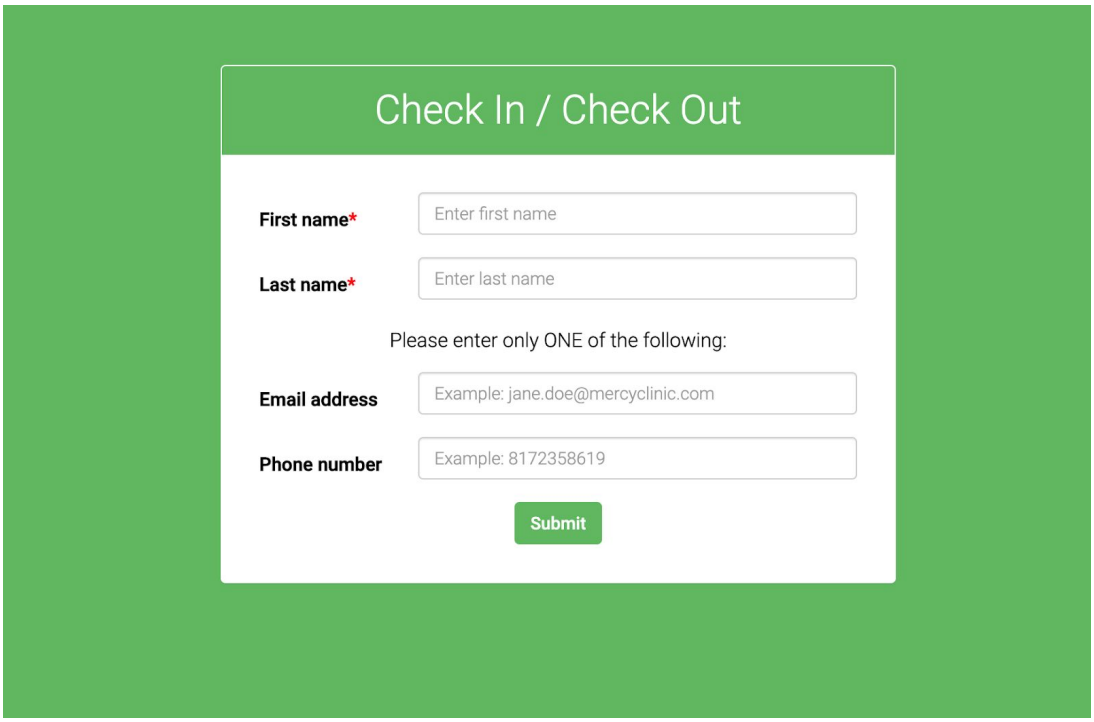


Important Notes:

1. For this system, it is **VERY IMPORTANT** that the admin use Incognito Window on the web browser to log in and navigate to the Check in/out system. This can help prevent unauthorized users from accessing the volunteer’s data. Please **do not save** your admin’s login credentials on the device that the clinic uses for check in/out (i.e., do not check Yes when the browser asks “Remember password for this site?”).
2. When navigating to the Check In / Out System, it’ll open up a new tab. For security purposes, it is best to **close the current tab (Dashboard page)** before leaving the Check In / Out page open for volunteers.
3. Volunteers must be in the database, i.e. their names must appear in the Volunteer System, in order to check in/out and have their hours recorded. Otherwise, the system cannot recognize them.
4. The system allows only one check in and one check out for a volunteer per day.
5. The navigation bar is hidden on the main page to prevent unauthorized users from accessing administrator’s private pages.

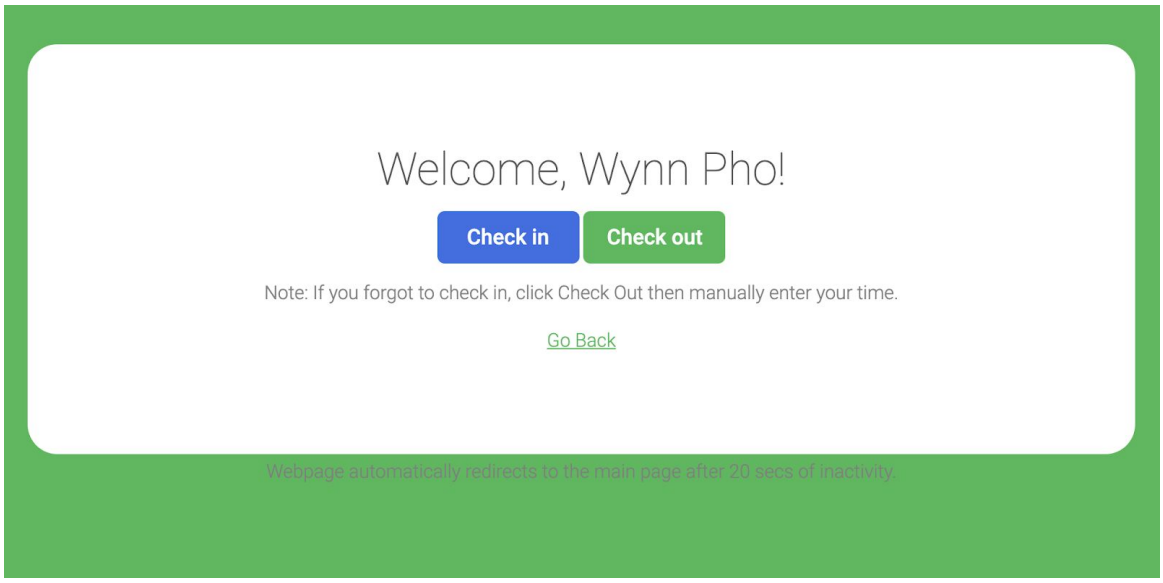
4.6.1. Check In

After an administrator navigates to the Check In / Check Out System by clicking the “Check in/out” tab, they will arrive at the following page (main page).



Main Page of Check In / Check Out System
The navigation bar is hidden on this page to prevent unauthorized users
from accessing administrator’s functionalities

A volunteer needs to enter their first name, last name and either email or phone number (as they appear in the database) and hit the Submit button. If all fields are correct, the volunteer will be directed to the following page.



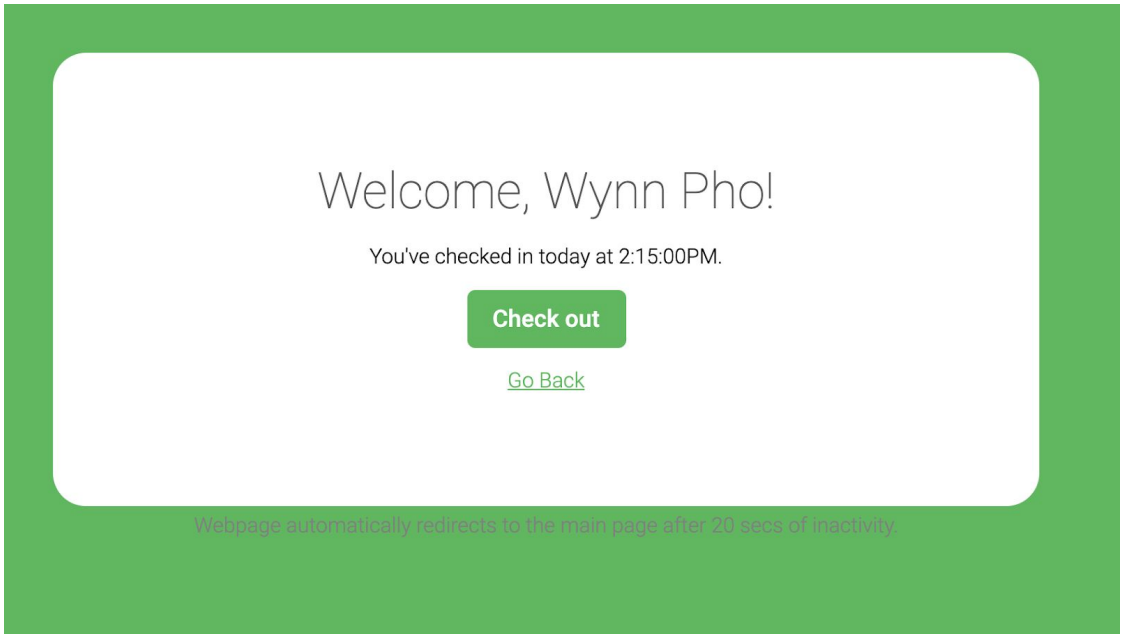
Punch Page

Then the user may click the blue button ("Check in") to finish the Check in process. After 15 seconds, the webpage will be automatically redirected to the main page so that it's ready for other volunteers to check in.

4.6.2. Check Out

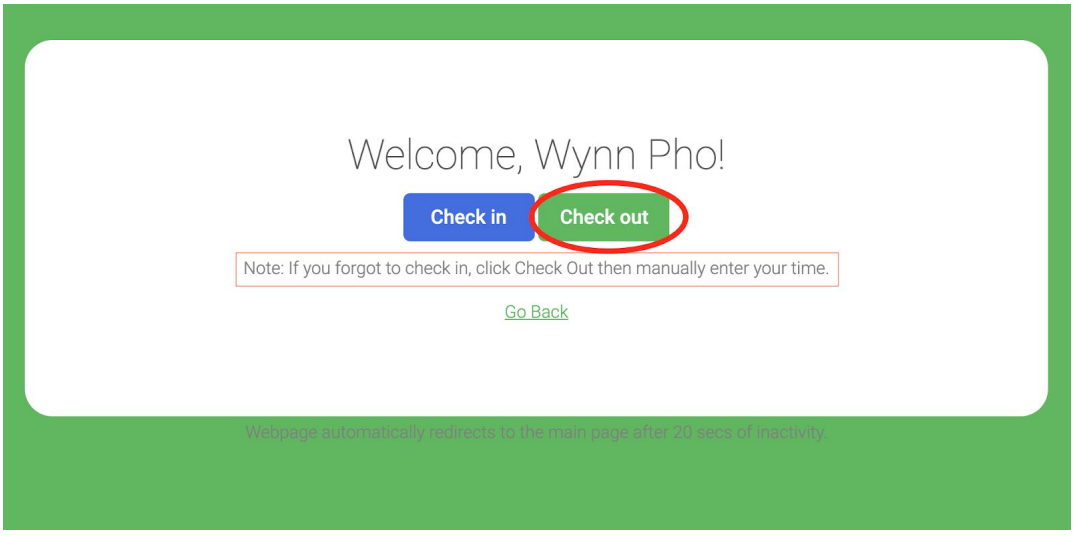
The Check Out process is just similar to the Check In process (section 4.6.1). A volunteer needs to enter their information on the main page first.

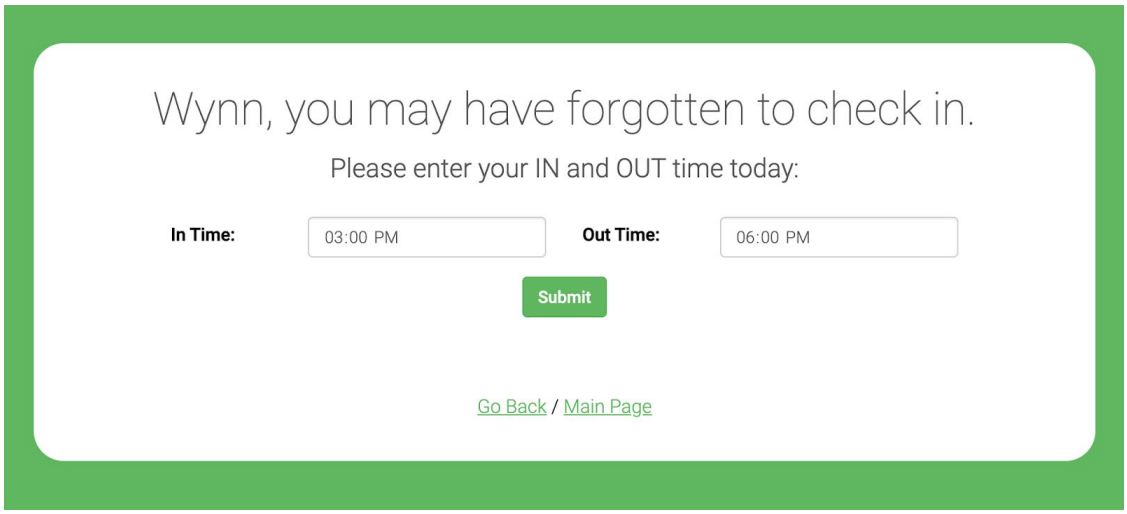
(a) If the volunteer has already checked in earlier in the day, the page will show their check in time (and hide the "Check in" button to avoid duplicate). Then they can click the green "Check out" button to finish the check out process.



Check In button is hidden if a volunteer's already checked in earlier that day

(b) If the volunteer forgot to check in earlier in the day, they can click Check out on the Punch page then manually enter their times. (There's also a small note on the Punch page for instruction.)





4.6.3. Others

(a) If a volunteer has checked in but forgot to check out, the Check Out time will appear as Missed in the Volunteer Hour Report. It can be edited by an administrator (see section 4.5.10)

Date	Check In	Check Out	Duration	Edit	Delete
2020-03-25	4:00 P.M.	4:15 P.M.	00:15:00	Edit	Delete
2020-03-30	11:00 A.M.	11:00 A.M.	00:00:00	Edit	Delete
2020-04-06	8:30 P.M.	Missed		Edit	Delete

(b) If a volunteer forgot to check in and check out on a certain day, an administrator can always manually add hours for them (see section 4.5.9).